**The HVAC Playbook**

**Version 2**

**Written for: PS Cool Heat**

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## **1. SaaS Solutions**

### **1.1 Call Tracking Software**

Call tracking software allows the business to monitor, record, and analyze incoming customer calls. This helps with lead attribution, marketing performance tracking, and ensuring a high-quality customer experience.

* **Current Software:** CallRail
* **Key Functions:**
  + Tracks and records inbound calls.
  + Identifies marketing channels that generate the most leads.
  + Improves call handling training and quality assurance.
* **Best Practices:**
  + Ensure all incoming calls are tagged and categorized appropriately.
  + Use call analytics to refine customer service scripts.
  + Regularly review recorded calls for training purposes.

**Relevant Information:**

PS Cool Heat currently uses CallRail as it is a well priced Call Tracking software with a great internal user interface.

From the Account Home - Analytics Portal, users can track the total calls in a week, the total “first time” callers as well as which CallRail Tracking Lines were used to initiate the call. This page is 100% configurable to your business and how it should work. PS Cool Heat uses this screen to track information regarding any call that comes in.

CallRail can record each call for playback later whether that be to obtain missing information not taken down in notes from a call, as well as listening to calls at a later date when working towards an employee review.

PS Cool Heat checks calls for Quality, Truthfulness, and Effectiveness with customers.

Each call is routed to the “Main Workflow” which is attached to our main phone number: 720.285.0145

For more information related to CallRail and how each part of the software works, either refer to Callrail.com and login with your company account, or check PS Cool Heat’s SOPs regarding CallRail.

There are other call tracking softwares on the market, most use a system called VOIP which stands for Voice Over Internet Protocol. Each of these systems that use VOIP use the internet to translate phone numbers into network addresses and send them to the correct place.

RingCentral, Vonage, DialPad, Zoom, CrazyCall, 800response, and CallSource are other options that will achieve decent to the same results at different price points.

What makes CallRail so great is the cost associated with the service.

CallRail uses a feature that they have created called “Lead Center” to allow for multiple answers of calls and text messages. This is paid in 1 month installments of $90.00 plus an additional $40.00 per month per “agent” until you reach 3+ agents at which point the cost is lowered to $30.00 per month per “agent”.

An “Agent” is anyone who has the ability to answer calls with their own accounts.

Any of these VOIP Softwares should be used “in-place” of a standard phone plan where the company phone number is “Ported” to the VOIP system and any “Tracking Number” created will be tied to the initial number.

CallRail allows customers to create multiple tracking lines and multiple “Workflows” that can be handled under each tracking line.

A callrail “Workflow” is a Call Tree for how a call is run through the system.

### **Standard Operating Procedures (SOPs)**

#### **Creating a New Tracking Number**

1. **Log in to CallRail.**
2. **Navigate to the Tracking section and select Numbers.**
3. **Click on Create Number.**
4. **Select the Source (e.g., Google Ads, Website, Print Ads).**
5. **Assign a destination number (where calls will be forwarded).**
6. **Configure settings such as call recording and call whisper.**
7. **Save and activate the number.**

#### **Creating a New User Account**

1. **Log in to CallRail as an administrator.**
2. **Go to Settings > Users.**
3. **Click on Invite New User.**
4. **Enter the user’s email address and assign appropriate permissions.**
5. **Click Send Invite.**
6. **The user will receive an email invitation to set up their account.**

#### **Creating New Callflows**

1. **Navigate to the Call Flow Builder in CallRail.**
2. **Click Create a New Call Flow.**
3. **Drag and drop modules such as Call Recording, Voicemail, Simultaneous Ring, or Menu Options.**
4. **Configure each module based on company preferences.**
5. **Assign the call flow to a specific tracking number.**
6. **Save and test the call flow to ensure proper routing.**

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### **1.2 Dispatch Platforms**

A dispatch platform is essential for scheduling service calls, assigning technicians, and ensuring efficient route planning.

* **Current Software:** HouseCall Pro
* **Key Functions:**
  + Schedules and assigns jobs to technicians.
  + Tracks technician location and job status.
  + Automates customer notifications and reminders.
* **Best Practices:**
  + Optimize routes to reduce travel time and fuel costs.
  + Keep dispatch updated with real-time technician availability.
  + Ensure clear communication between the office and field staff.

**Relevant Information:**

PS Cool Heat currently uses a dispatch platform known as HouseCall Pro.

Other Dispatch Platforms used in the HVAC world are:

* ServiceTitan
* Payzer
* BuildOps
* BlueFolder
* ServiceTrade
* Service Fusion
* Jobber
* Dispatch.me

PS Cool Heat has decided to use HouseCall Pro as it has many integrations to currently used software, is rather cheap compared to competitors and includes a lot of features standard that big companies like ServiceTitan charge for at additional prices.

HouseCall Pro allows PS Cool Heat the ability to send automated text messages to customers, communicate with customers via the “Inbox”, schedule estimates, jobs, and events, as well as keep a database of Customer data including property information such as Model#s and Serial#’s that are installed at customer homes for easy data acquisition.

HouseCall Pro has a powerful feature called “Pricebook” which allows a company to input all the products and services as well as associated pricing into one easy to access system. When an employee needs to create an estimate, invoice, etc. said employee can easily search through the pricebook to find all the information needed, and add it to an estimate or invoice seamlessly.

HouseCall Pro also has an integration between Facebook, and Google to allow for all of the companies reviews to be easily collated into the same area. HouseCall Pro will automatically send customers a message asking them to review said company every 3 days after a customer job is completed. If the customer’s email is a Gmail account it will automatically have them review on Google, if the customer logs into their account via the Facebook Integration it will automatically have them review the company on Facebook, otherwise it will default to HouseCall Pro’s review page which can be accessed via a link given to administrators of the software that should add the the link to their company website.

### **Standard Operating Procedures (SOPs)**

#### **Updating the Product Pricebook**

1. Log in to HouseCall Pro as an admin.
2. Navigate to **Price Book** under **Settings**.
3. Select **Products** and locate the item to be updated.
4. Click **Edit**, adjust the pricing or details, and save changes.

#### **Adding a New Product Pricebook**

1. Go to **Price Book** > **Products**.
2. Click **Add Product**, enter product details, and set pricing.
3. Assign it to relevant categories and save.

#### **Updating the Service Pricebook**

1. Navigate to **Price Book** > **Services**.
2. Find the service, click **Edit**, update the details, and save changes.

#### **Adding a New Service Pricebook**

1. Click **Add Service** under **Price Book**.
2. Enter service details, pricing, and assign relevant categories.
3. Save the new service.

#### **Creating a New Customer**

1. Click **Customers** in the top menu.
2. Select **Add Customer**, enter details, and save.

#### **Updating a Current Customer**

1. Search for the customer in **Customers**.
2. Click on the profile, edit details, and save.

#### **Scheduling a Customer**

1. Click **Schedule Job**, select customer, assign technician, set time, and save.

#### **Creating a New Estimate**

1. Navigate to **Estimates**, click **New Estimate**.
2. Enter customer details, add services/products, and save.

#### **Creating a New Job**

1. Click **Jobs** > **New Job**.
2. Assign a technician, input job details, and confirm.

#### **Converting an Estimate Into a Job**

1. Open the estimate, click **Convert to Job**, assign technician, and finalize.

#### **Clearing Unscheduled Jobs**

1. Navigate to **Jobs** > **Unscheduled Jobs**.
2. Review, reschedule, or cancel as necessary.

#### **Searching for Customers by Lead Source**

1. Go to **Customers**, use the **Filter** option.
2. Select **Lead Source** and enter criteria.

#### **Taking Customer Payments**

1. Open the job, click **Take Payment**.
2. Choose method (credit card, check, Zelle, etc.), confirm transaction.

#### **Creating a New Employee in HouseCall Pro**

1. Navigate to **Employees** under **Settings**.
2. Click **Add Employee**, input details, set permissions, and save.

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### **1.3 Email Management**

Effective email management ensures that customer inquiries, vendor communications, and internal messages are handled efficiently.

* **Current Software:** Google Workspace
* **Key Functions:**
  + Organizes emails with folders and filters.
  + Integrates with scheduling tools for seamless communication.
  + Provides automated responses for frequently asked questions.
* **Best Practices:**
  + Use templates for common customer inquiries.
  + Schedule follow-ups to maintain strong customer relationships.
  + Keep inboxes organized with priority tagging and folders.

**Relevant Information:**

PS Cool Heat currently uses the Google for Business Suite to handle all emails, cloud storage, and management of documents.

PS Cool Heat also runs an “internal” website created for employees only that gives employees direct searchable access to SOPs, customer data and information, as well as training, etc.

Other platforms that companies can use are:

* Microsoft for Business
* Front
* Hiver HQ
* Zoho
* Zendesk

PS Cool Heat uses Google as it is an industry standard and works well with integration between our business practices.

The GSuite software systems most frequently used by PS Cool Heat are:

* Google Docs
* Google Sheets
* Google Forms
* Business Management Profile
* Meet
* Calendar
* Sites (Internal Company Website)
* Analytics

**Standard Operating Procedures (SOPs)**

#### **Accessing Google Business Administrator Panel**

1. Navigate to [admin.google.com](https://admin.google.com).
2. Log in with your administrator credentials.
3. Access settings for users, groups, and permissions.

#### **Navigating the Administrator Panel**

1. Dashboard provides an overview of user activity.
2. Use the left-hand menu to manage users, devices, apps, and security settings.
3. Regularly review user activity logs for security purposes.

#### **Adding a New Employee Account to Google Business Suite**

1. Open the **Admin Console**.
2. Click **Users > Add a User**.
3. Enter required details, assign a role, and create an initial password.
4. Click **Add User** and send login details to the new employee.

#### **Accessing Google Drive**

1. Open [drive.google.com](https://drive.google.com).
2. Locate the shared drives: **Customers, Marketing, Office, Technicians**.
3. Use the search bar to find specific files within shared drives.

#### **Modifying Permissions for a Shared Drive or Shared Document**

1. Right-click the file or folder and select **Share**.
2. Enter the email of the user you want to share with.
3. Assign appropriate access level (Viewer, Commenter, Editor).
4. Click **Send** to grant access.

#### **Understanding and Using Google Ads**

1. Navigate to [ads.google.com](https://ads.google.com).
2. Manage campaigns, keywords, and ad performance.
3. Adjust budgets and monitor ROI.

#### **Updating Google My Business Profile**

1. Go to Google My Business.
2. Select your business profile.
3. Update business hours, services, and contact details.
4. Click **Save Changes**.

#### **Creating a Google Meet Instance**

1. Open Google Calendar and create an event.
2. Click **Add Google Meet Video Conferencing**.
3. Share the meeting link with attendees.

#### **Conversations with Google Chat**

1. Open [chat.google.com](https://chat.google.com).
2. Start a new conversation or join an existing one.
3. Use direct messages or create a group chat for team discussions.

#### **Adding a Customer or Vendor to Google Contacts**

1. Open [contacts.google.com](https://contacts.google.com).
2. Click **Create Contact**.
3. Enter name, email, and phone details.
4. Click **Save**.

#### **Understanding and Utilizing Google Analytics**

1. Access [analytics.google.com](https://analytics.google.com).
2. Review key metrics: traffic, user behavior, and conversions.
3. Customize reports to track HVAC business performance.

**1.4 Workplace Management**

Workplace management tools streamline internal communication, task management, and team collaboration.

* **Current Software:** Google Meet / Google Chat / HouseCall Pro Chat / GoCo Chat
* **Key Functions:**
  + Facilitates team messaging and file sharing.
  + Helps assign and track tasks.
  + Supports integration with other workplace tools.
* **Best Practices:**
  + Establish communication protocols for urgent vs. non-urgent messages.
  + Assign tasks with clear deadlines and responsibilities.
  + Utilize notifications and reminders for task completion.

**Relevant Information:**

PS Cool Heat currently uses a combination of Google Suite, Confluence and Clickup.com for workplace management.

PS Cool Heat uses these softwares to track current company operations in the office and handle projects that require multiple employees to complete.

### 

### **1.5 HR Platform**

An HR platform helps manage employee records, payroll, benefits, and compliance with labor laws.

* **Current Software:** GoCo
* **Key Functions:**
  + Automates payroll and benefits administration.
  + Tracks employee performance and documentation.
  + Provides compliance tools for labor laws.
* **Best Practices:**
  + Keep employee records updated with performance notes.
  + Automate reminders for benefits enrollment and compliance requirements.
  + Use HR analytics to track hiring trends and employee retention.

**Relevant Information:**

PS Cool Heat currently uses Gathr a barebones software created by GoCo with additional implementation from GoCo, the systems we utilize are:

* Hiring System (JazzHR)
  + Integrate with 20k+ Job Boards
  + Custom Applications
  + Applicant Tracking
  + Email Sync
  + Workflows
* Benefits Administration (Provided by Colonial Life)
  + Robust system for holding and allowing new employees the ability to sign up for company benefits.
* Custom Workflows
  + Automated task dynamic system
  + Performance Reviews
  + Messages
  + HR Data Pull
* Advanced Time Off
  + Custom Policies for PTO accrual schedules
  + Maximum Balances, tenures, carry-overs, proration, and liability tracking.
  + Automatically sync’s with Payroll.
* Performance Management
  + Customer Review Builder
  + Customizable Text Boxes, lists and checkboxes.
  + Opinion scales
  + Calculated fields
  + Automatic review schedules
  + Employee goal tracker
  + Employee employment and talent timeline.
* Premium HR
  + Digital Onboarding
  + Magic Document Builder
  + AI Document Creation
  + Company Announcements
  + AI Knowledge Base
  + Org Charts
  + Employee Directory
  + Moderm Employee Engagement UI
  + eNPS Survey
  + Custom ad-hoc reporting
  + Dedicated Support Team

### **Standard Operating Procedures (SOPs)**

#### **Reaching Out to GoCo for Help with the Platform**

1. Log in to GoCo and navigate to the **Help Center**.
2. Use the search function to find relevant documentation.
3. Submit a support ticket or use the live chat for assistance.
4. Call GoCo support for urgent issues.

#### **How to Access JazzHR**

1. Log in to GoCo.
2. Click on the **Integrations** tab and select **JazzHR**.
3. Use your credentials to log in to JazzHR.

#### **How to Use JazzHR for Hiring/Recruiting**

1. Open JazzHR and navigate to the **Jobs** section.
2. Create a new job posting and enter details.
3. Post the job to multiple job boards.
4. Track applicant progress through the hiring pipeline.

#### **Understanding Applicant Tracking**

1. Navigate to **Candidates** in JazzHR.
2. Review applicants' statuses in the hiring funnel.
3. Use tags to categorize applicants.

#### **Understanding How Benefits Administration Works**

1. Log in to GoCo and select **Benefits**.
2. View active benefits, enroll employees, and manage policies.
3. Edit benefits settings as needed.

#### **How to Use Custom Workflows for Business HR Needs**

1. Navigate to **Workflows**.
2. Select **Create Workflow**, define steps, and assign employees.
3. Save and activate the workflow.

#### **How to Utilize Advanced Time Off**

1. Go to **Time Off** in GoCo.
2. Configure PTO policies and approve requests.
3. Track employee leave balances.

#### **How to Utilize the Performance Management Feature**

1. Open **Performance Management** in GoCo.
2. Set performance goals and assign reviews.
3. Track employee progress over time.

#### **How to Add a New Employee to GoCo System**

1. Navigate to **Employees** and click **Add Employee**.
2. Enter personal and job details, then save.

#### **How to Add a New Contractor to GoCo System**

1. Go to **Contractors** and click **Add Contractor**.
2. Enter necessary details and save the profile.

#### **Understanding the Org Chart**

1. Navigate to **Company** > **Org Chart**.
2. View reporting structures and employee roles.

#### **How to Use the Employee Directory**

1. Click on **Directory**.
2. Search for employees by name or department.

#### **How to Send a New Company Announcement**

1. Go to **Company Announcements**.
2. Click **Create Announcement**, enter details, and send.

#### **How to Set Employee Permissions in GoCo**

1. Navigate to **Settings** > **Permissions**.
2. Assign roles and define access levels.

#### **How to Use the Magic Document Builder**

1. Click on **Documents** > **Magic Document Builder**.
2. Upload or create HR documents.
3. Customize templates and distribute them.

#### **How to Onboard a New Employee**

1. Click **Onboarding** and select **New Employee**.
2. Assign documents and tasks.
3. Monitor progress.

#### **How to Offboard an Employee**

1. Go to **Offboarding**.
2. Set a termination date and assign exit tasks.
3. Ensure final documentation is completed.

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### **1.6 Password Management**

**Software Used:** Keeper Password Manager

**Why It Is Important:**Keeper Password Manager is essential for securely storing, managing, and sharing login credentials within the organization. It enhances security by enabling encrypted password storage, multi-factor authentication, and role-based access control.

### **Key Functions:**

* Provides a secure vault for storing company passwords.
* Enables encrypted sharing of login credentials among authorized personnel.
* Offers audit trails and security monitoring for password activity.

### **Best Practices:**

* Use strong, unique passwords for each account and store them in Keeper.
* Enable multi-factor authentication for an added layer of security.
* Regularly review access permissions and remove inactive accounts.
* Utilize Keeper’s password generator to create strong, unguessable passwords.

### **Standard Operating Procedures (SOPs)**

#### **Downloading and Installing Keeper Browser Extension (Safari & Google Chrome)**

1. Open your browser (Safari or Google Chrome).
2. Navigate to the **Keeper Browser Extension** page:
   * **For Chrome:** Visit the Chrome Web Store and search for **Keeper Password Manager**.
   * **For Safari:** Open the **Mac App Store** and search for **Keeper Password Manager**.
3. Click **Add to Chrome** or **Get** for Safari.
4. Confirm installation and allow necessary permissions.
5. Click on the **Keeper Extension** icon in the browser toolbar.
6. Log in with your Keeper credentials and enable auto-fill features.
7. Configure settings based on business security policies.

#### **Adding a New Password File**

1. Log in to Keeper Password Manager.
2. Click on **Vault** and select **Add Record**.
3. Enter the necessary details, including the website, username, and password.
4. Add any notes or custom fields if required.
5. Click **Save** to securely store the password.

#### **Deleting a Current Password File**

1. Navigate to the **Vault** in Keeper.
2. Locate the password file you want to delete.
3. Click on the three-dot menu and select **Delete**.
4. Confirm the deletion when prompted.

#### **Updating a Password File**

1. Open **Vault** and find the record you wish to update.
2. Click **Edit**, update the necessary fields (e.g., password, username).
3. Save the changes to ensure the new information is stored securely.

#### **Sharing Passwords with Other Users**

1. Select the password file within **Vault**.
2. Click on **Share** and enter the email address of the recipient.
3. Set access permissions (View Only, Edit, or Full Control).
4. Click **Send** to securely share the credentials.

#### **How to Access Keeper Administrator Panel**

1. Log in to Keeper with admin credentials.
2. Navigate to **Admin Console**.
3. Manage user access, enforce security policies, and review audit logs.

#### **How to Add a New Employee to Your Business Keeper Account**

1. Open the **Admin Console** in Keeper.
2. Navigate to **Users & Roles** and click **Add User**.
3. Enter the employee’s email address and assign appropriate permissions.
4. Click **Invite User** to send an activation email.
5. Ensure the employee sets up their account and enables two-factor authentication.

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### **1.7 Device Management**

**Software Used:** iMazing  
**Business License:** Permanent access for up to 10 devices.  
**Activation Code:** **imz3793c27e4689f41e**

**Why It Is Important:**iMazing is a device management software that enables secure data transfer, backup, and management of Apple devices. It provides an efficient way to manage business iPhones and iPads, ensuring critical data is backed up and accessible when needed.

### **Key Functions:**

* Allows secure backup and transfer of device data.
* Enables access to messages, call logs, and contact lists.
* Facilitates easy provisioning and setup of new devices.
* Provides a way to safely delete and retire old devices.

### **Best Practices:**

* Regularly back up all business devices to prevent data loss.
* Store backups in a secure location within the company’s cloud storage.
* Maintain a record of all devices added to iMazing for easy tracking.

### **Standard Operating Procedures (SOPs)**

#### **How to Add a New Device**

1. Connect the device to the computer via USB.
2. Open iMazing and wait for the device to appear.
3. Click **Trust This Computer** on the device if prompted.
4. Follow the on-screen steps to complete the setup.

#### **How to Access Data from a Device**

1. Open iMazing and select the device from the list.
2. Navigate to **Backup & Data Management**.
3. Choose the type of data you wish to access (Messages, Contacts, Photos, etc.).

#### **Where the Data Should Be Saved**

**Backup Location:** [Insert iCloud or network folder path here]

#### **How to Access Contact Lists**

1. Select the device in iMazing.
2. Click on **Contacts** from the side menu.
3. Export the contact list as needed (CSV, VCF, or direct sync to another device).

#### **How to Access Message Conversations**

1. Select the device in iMazing.
2. Click on **Messages**.
3. Browse message history, export conversations if necessary.

#### **How to Provision a New Device**

1. Connect the new device to the computer.
2. Select **Quick Transfer** or **Restore from Backup** in iMazing.
3. Choose an existing backup if available.
4. Follow the prompts to configure settings and transfer necessary files.

#### **How to Delete a Device**

1. Open iMazing and select the device.
2. Navigate to **Erase All Content & Settings**.
3. Confirm the action and follow on-screen instructions to complete the wipe.

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### **1.8 Apple Business Manager**

**Software Used:** Apple Business Manager  
**Why It Is Important:**Apple Business Manager is a cloud-based portal that allows businesses to manage Apple devices, apps, and accounts. It streamlines device deployment, enhances security, and simplifies application management for company-owned Apple devices.

### **Key Functions:**

* Allows centralized management of Apple devices.
* Facilitates automated device provisioning and enrollment.
* Controls application installation and removal for company devices.
* Manages Apple ID accounts and permissions.

### **Best Practices:**

* Assign devices to employees based on their roles and responsibilities.
* Regularly update application lists to ensure security and efficiency.
* Maintain strict access control using Apple Business Manager’s permissions system.

### **Standard Operating Procedures (SOPs)**

#### **How to Add a New Device**

1. Log in to **Apple Business Manager**.
2. Navigate to **Devices** > **Enroll Devices**.
3. Enter the device’s serial number or assign it via MDM enrollment.
4. Assign the device to the appropriate department or employee.
5. Click **Save** to complete the enrollment process.

#### **How to Provision a New Device**

1. Ensure the device is added to **Apple Business Manager**.
2. Turn on the new device and follow the setup wizard.
3. When prompted, select **Remote Management**.
4. Log in with the Apple Business Manager admin credentials.
5. Confirm the device is configured with the correct policies and applications.

#### **Adding Applications to a List**

1. Open **Apple Business Manager** and go to **Apps & Books**.
2. Search for the application needed and click **Buy Licenses**.
3. Assign the purchased licenses to specific users or devices.
4. Sync with your Mobile Device Management (MDM) solution to push apps.

#### **Removing Applications from a List**

1. Open **Apple Business Manager** and navigate to **Apps & Books**.
2. Select the application you want to remove.
3. Click **Revoke Licenses** for the associated devices or users.
4. Confirm the action to complete the removal process.

#### **Contact Sync**

1. Open **Apple Business Manager** and go to **Users**.
2. Ensure contacts are stored under managed Apple IDs.
3. Sync user profiles to the company’s iCloud contacts.

#### **iCloud Drive Access**

1. Ensure employees use their managed Apple ID.
2. Set permissions for iCloud file sharing via **Apple Business Manager**.
3. Configure file access levels based on role-specific needs.

#### **Permissions System**

1. Open **Apple Business Manager** and navigate to **Roles & Permissions**.
2. Assign administrator, manager, or standard user roles accordingly.
3. Review and update permissions as necessary.

#### **Help / FAQ**

* Visit [Apple Business Manager Support](https://support.apple.com/business)
* Contact Apple’s enterprise support team if additional assistance is required.

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## **2. Hardware Solutions**

### **2.1 Apple Products**

Apple devices such as iPhones, iPads, and MacBooks are used for business communication, scheduling, and accessing cloud-based HVAC software.

Apple Inc. manufactures great products that last anywhere between 4-6 years on average. The hardware isn’t what sets Apple apart from Microsoft, however; it’s the software.

90% of computer viruses written and deployed for malicious use are designed for Microsoft Windows, as it is an industry standard in business practices.

For this reason, PS Cool Heat runs all Apple products for company operations.

### **Usage:**

* **iPhones** for field technicians to access dispatch software and customer records.
* **iPads** for presenting estimates and processing payments in the field.
* **MacBooks** for office administration and marketing management.

### **Best Practices:**

* Keep devices updated to the latest iOS/macOS for security and performance.
* Use cloud syncing for seamless access to business documents.
* Implement Mobile Device Management (MDM) to control and secure company devices.

### **Standard Operating Procedures (SOPs)**

#### **Accessing Apple Business Manager**

(Refer to Apple Business Manager SOPs in the SaaS Solutions section.)

#### **Accessing iMazing Backups**

(Refer to iMazing SOPs in the SaaS Solutions section.)

#### **Wiping a Device**

1. Open **Settings** on the device.
2. Navigate to **General** > **Transfer or Reset iPhone/iPad/Mac**.
3. Select **Erase All Content and Settings**.
4. Confirm and enter the administrator passcode if required.
5. Wait for the reset process to complete.

#### **Setting Up a New Device**

1. Power on the new device and follow the on-screen setup instructions.
2. When prompted, connect to a Wi-Fi network.
3. Sign in with the company’s **Managed Apple ID**.
4. Enroll the device in **Apple Business Manager** if not already assigned.
5. Restore from an **iMazing Backup** if necessary.
6. Install required applications via **MDM or Apple Business Manager**.
7. Verify access to company resources and test system functionality.

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### **2.2 Windows Products**

Windows-based desktops and laptops are critical for managing backend operations, accounting, and customer service.

Microsoft tends to subcontract most of their software-related package updates to third-party companies, which can lead to massive outages when security updates are sent to Microsoft devices.

### **Usage:**

* **Office computers** for dispatchers and administrators.
* **Laptops** for managers to work remotely.

### **Best Practices:**

* Ensure proper antivirus and security software is installed.
* Use shared network drives for easy document access.
* Perform regular system backups to prevent data loss.

### **Standard Operating Procedures (SOPs)**

#### **Updating a Windows-Based Computer**

1. Click the **Start** button and open **Settings**.
2. Navigate to **Update & Security** > **Windows Update**.
3. Click **Check for Updates**.
4. If updates are available, select **Download and Install**.
5. Restart the computer if prompted to complete the update.

#### **Rolling Back a Software Update on Windows**

1. Open **Settings** > **Update & Security** > **Recovery**.
2. Under **Go back to the previous version of Windows**, click **Get Started**.
3. Follow on-screen instructions to roll back to a previous version.
4. Restart the system once the rollback is complete.

#### **Permissions on Windows**

1. Right-click on the file or folder and select **Properties**.
2. Navigate to the **Security** tab.
3. Click **Edit** and modify user permissions as required.
4. Click **Apply** and then **OK** to save changes.

#### **Adding a New Chrome User Account to Google Chrome on a Windows PC**

1. Open **Google Chrome**.
2. Click on the profile icon in the top-right corner.
3. Select **Add** and enter the new user’s name.
4. Sign in with the new user’s Google account.
5. Customize settings and sync as needed.

#### **Adding a New Keeper User Account for the Google Chrome Keeper Extension on a Windows PC**

1. Open **Google Chrome** and click on the **Keeper Extension**.
2. Select **Log In** and enter company Keeper credentials.
3. Click **Create New User** if setting up a new employee.
4. Assign appropriate permissions within Keeper.
5. Confirm login and ensure Keeper auto-fill is enabled.

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### **2.3 Smart Phones**

Smartphones are essential tools for communication, navigation, and accessing HVAC software on the go. At PS Cool Heat, field technicians and administrative staff rely on smartphones for job tracking, invoicing, customer communication, and accessing important company applications.

PS Cool Heat either supplies smartphones to employees or requires employees to use their personal devices with necessary applications installed. The **HouseCall Pro** app is mandatory for all employees using their phones for work purposes, as it enables them to **track jobs, invoice customers, and leave notes for administrative staff** regarding service calls and job details.

### **Usage:**

* **Technicians:** Use smartphones to receive job details, update work status, process invoices, and communicate with customers.
* **Administrative Staff:** Use smartphones for scheduling, managing service requests, and responding to customer inquiries.
* **Managers:** Utilize smartphones for overseeing daily operations, handling escalations, and coordinating team activities.

### **Best Practices:**

* Ensure company devices come **pre-installed** with all necessary applications.
* Use **call tracking software** to monitor business-related communications.
* Set up **two-factor authentication (2FA)** for all company accounts to enhance security.
* Keep all **business-related data within company-approved applications** to maintain privacy.
* Regularly update software and apps to **ensure security and optimal performance**.
* Use **cloud backups** to prevent data loss on company-issued devices.

### **Standard Operating Procedures (SOPs)**

#### **Setting Up a Company-Issued Smartphone**

1. Unbox the smartphone and power it on.
2. Connect to a secure Wi-Fi network.
3. Log in with the assigned company-managed Apple ID (iOS) or Google account (Android).
4. Install and configure required applications:
   * **HouseCall Pro**
   * **Google Workspace (Gmail, Drive, Calendar, Chat, Meet)**
   * **CallRail (for tracking business calls)**
   * **Keeper Password Manager**
5. Enable **automatic cloud backups** for contacts, emails, and work files.
6. Set up **2FA** for company accounts and enable biometric security (Face ID or fingerprint scan).

#### **Installing HouseCall Pro on Personal Devices**

1. Open the **App Store (iOS)** or **Google Play Store (Android)**.
2. Search for **HouseCall Pro** and tap **Install**.
3. Open the app and sign in using company credentials.
4. Allow necessary permissions for location tracking, notifications, and contacts.
5. Verify that job tracking and invoicing features are functioning properly.

#### **Enabling Call Tracking for Business Calls**

1. Ensure **CallRail** or the company-approved call tracking software is installed.
2. Open the **CallRail** app and sign in.
3. Configure call routing to direct **business calls to the assigned tracking number**.
4. Enable call recording and reporting to monitor customer interactions.

#### **Setting Up Security Protocols (2FA & Biometric Authentication)**

1. Open **Settings** and navigate to **Security & Privacy**.
2. Enable **Face ID / Touch ID / Fingerprint Recognition**.
3. Set up **Two-Factor Authentication (2FA)** for work accounts via:
   * Google Authenticator
   * Microsoft Authenticator
   * SMS/Email-based authentication
4. Verify 2FA setup with a test login.

#### **Backing Up and Restoring a Company-Issued Smartphone**

1. Go to **Settings** > **Backup & Sync**.
2. Enable automatic backup to **iCloud (iOS) or Google Drive (Android)**.
3. Check that call logs, contacts, and work files are included in the backup.
4. If restoring a device, select **Restore from Backup** during the setup process.

#### **Wiping a Device Before Employee Offboarding**

1. **Back up important company data** using Google Drive or iCloud.
2. Open **Settings** and navigate to **General > Reset > Erase All Content and Settings**.
3. Confirm factory reset and wait for the process to complete.
4. Remove the device from **Apple Business Manager** or **Google Workspace**.
5. Verify that the device no longer has access to company data.

#### **Replacing a Lost or Stolen Company-Issued Smartphone**

1. Report the lost or stolen device to IT support immediately.
2. Use **Find My iPhone (iOS)** or **Find My Device (Android)** to locate or remotely wipe the device.
3. Issue a replacement device following the **new device setup SOP**.
4. Reset passwords for all accounts accessed on the lost/stolen device.

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### **2.4 Tablets**

Tablets provide a **mobile-friendly** solution for field technicians and Comfort Advisors, enabling them to **access manuals, process payments, and update work orders** efficiently. Due to their larger screen size, tablets allow for a more **interactive customer experience**, improving **sales conversion rates** by presenting detailed estimates in real-time while still in the customer’s home.

At **PS Cool Heat**, all Comfort Advisors are issued **one Apple iPad** at the start of their employment. They are required to keep the iPad with them at all times and use it on job sites for:

* **Creating estimates**
* **Processing jobs and invoices**
* **Presenting financing options**
* **Sharing HVAC solutions visually with customers**

For additional procedures specific to Comfort Advisors, refer to the **Comfort Advisor SOPs** section.

### **Best Practices:**

* Use **ruggedized protective cases** to prevent damage on job sites.
* Sync with **cloud-based services** for **real-time updates** and seamless data access.
* Train Comfort Advisors and technicians on **how to effectively use tablets for estimates and payments**.
* Keep devices **updated** with the latest iOS version and security patches.
* Ensure HouseCall Pro and other necessary applications **remain installed and functional**.

### **Standard Operating Procedures (SOPs)**

#### **Setting Up a Company-Issued iPad**

1. Power on the **iPad** and connect to a **secure Wi-Fi network**.
2. Log in using the assigned **Managed Apple ID**.
3. Enroll the device in **Apple Business Manager** for company tracking.
4. Install the following essential applications:
   * **HouseCall Pro** (for job tracking, estimates, and invoices)
   * **Google Workspace** (Gmail, Calendar, Drive, Chat, Meet)
   * **Keeper Password Manager** (for secure access to credentials)
   * **Finance and Payment Apps** (if applicable)
5. Enable **iCloud Backup** to prevent data loss.
6. Activate **Find My iPad** to enable remote tracking in case of loss or theft.

#### **Installing HouseCall Pro on a Company iPad**

1. Open the **App Store** and search for **HouseCall Pro**.
2. Tap **Install**, then open the app.
3. Sign in using the assigned **PS Cool Heat** account.
4. Allow necessary permissions for **location tracking, notifications, and contacts**.
5. Verify job tracking, estimate creation, and invoice processing features are functional.

#### **Syncing iPads with Cloud Services**

1. Open **Settings** > **Apple ID** > **iCloud**.
2. Enable iCloud sync for:
   * **Contacts** (to store customer information)
   * **Drive** (to access shared business files)
   * **Notes** (to keep job-related notes secure)
3. Ensure **automatic backups** are enabled for data recovery.

#### **Using the iPad for Customer Presentations**

1. Open **HouseCall Pro** and pull up the **customer's estimate**.
2. Use the **large screen** to visually explain pricing, services, and options.
3. Walk customers through **financing options** and address concerns in real-time.
4. Use screen mirroring (if available) to project onto a larger display if needed.

#### **Processing Payments on an iPad**

1. Open **HouseCall Pro** and navigate to the **Job Invoice**.
2. Select **Payment Options** (Credit Card, ACH, Financing, etc.).
3. Allow the customer to enter their payment details.
4. Confirm the payment is processed and issue a digital receipt.

#### **Backing Up and Restoring a Company iPad**

1. Open **Settings** > **iCloud** > **iCloud Backup**.
2. Tap **Back Up Now** and confirm that recent backups exist.
3. If restoring a new device, select **Restore from iCloud Backup** during setup.

#### **Wiping a Company iPad Before Offboarding**

1. **Back up important company data** to iCloud or Google Drive.
2. Open **Settings** > **General** > **Transfer or Reset iPad**.
3. Select **Erase All Content and Settings** and confirm the action.
4. Remove the device from **Apple Business Manager**.
5. Verify that all company data is wiped before returning the device.

#### **Replacing a Lost or Stolen iPad**

1. Report the loss to **IT Support or Management** immediately.
2. Use **Find My iPad** to attempt tracking or remotely wipe the device.
3. Assign a **replacement iPad** and follow the **new device setup SOP**.
4. Reset passwords for all accounts previously accessed on the lost iPad.

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### **2.5 Laptops and Software**

Laptops serve a **crucial role** in PS Cool Heat’s business operations, supporting administrative tasks, marketing, financial tracking, and customer management. Each **office staff member is issued one MacBook Air** at the start of their employment, which must be **kept with them at all times and used exclusively for work-related purposes**.

As **PS Cool Heat utilizes Google Workspace (G Suite) and web-based software**, employees should **not install any additional software** on their laptops unless approved by the **company IT Administrator**. All necessary applications are available via the **Google Chrome browser** or managed through **cloud-based platforms**.

### **Usage:**

* **Administrative Staff:** Utilize MacBooks for managing customer data, scheduling, and office operations.
* **Marketing Team:** Leverage laptops for content creation, social media management, and analytics.
* **Finance Team:** Use financial tracking software and reporting tools to manage company accounts.

### **Best Practices:**

* **Assign specific laptops** to employees based on their roles to ensure appropriate system access.
* **Keep software updated** to maintain security and compliance with company policies.
* **Enable remote access** and security features to allow for work-from-home flexibility.
* **Ensure cloud backups** are enabled for critical company documents.
* **Restrict software installation** to prevent security risks and system conflicts.

### **Standard Operating Procedures (SOPs)**

#### **Setting Up a New Company-Issued MacBook**

1. Power on the **MacBook Air** and follow the on-screen setup guide.
2. Connect to a **secure Wi-Fi network**.
3. Sign in using the assigned **Managed Apple ID**.
4. Enable **FileVault Encryption** for security.
5. Install and log in to the following required applications:
   * **Google Chrome** (Set as the default browser)
   * **Google Workspace Apps (Drive, Gmail, Calendar, Meet, Chat)**
   * **Keeper Password Manager**
   * **HouseCall Pro (If applicable)**
6. Configure **iCloud Backup** and **Google Drive Sync**.
7. Enable **Find My Mac** for security tracking.
8. Verify system updates and install pending macOS updates.

#### **Installing and Using Google Chrome on a MacBook**

1. Open **Safari** and go to Google Chrome Download.
2. Download and install **Google Chrome**.
3. Sign in with the employee’s **PS Cool Heat Google Account**.
4. Enable **Google Sync** to ensure access to saved bookmarks, passwords, and settings.
5. Set **Google Chrome as the default browser**.

#### **Accessing Company Files via Google Drive**

1. Open **Google Drive** via **drive.google.com**.
2. Navigate to shared folders:
   * **Customers**
   * **Marketing**
   * **Office**
   * **Technicians**
3. Use the **Google Drive Desktop App** if offline access is required.
4. Ensure files are stored in **company-approved folders** and avoid saving work files locally.

#### **Updating macOS and Installed Software**

1. Click on the **Apple Menu** and select **System Settings**.
2. Navigate to **Software Update**.
3. If an update is available, click **Download and Install**.
4. Restart the MacBook if prompted.
5. Ensure **Google Chrome, HouseCall Pro, and other business applications** are up to date.

#### **Requesting Additional Software**

1. Contact the **company IT Administrator** before installing any software.
2. If approved, download only from **official sources** (Mac App Store or developer site).
3. Avoid downloading third-party software that has not been vetted by IT.

#### **Enabling Remote Access for Work-from-Home Flexibility**

1. Ensure **Google Drive Sync** is enabled for accessing company files.
2. Use **Google Meet** and **Google Chat** for remote communication.
3. Enable **Mac Screen Sharing or Remote Desktop** if needed (with IT approval).
4. Use **Keeper Password Manager** to securely access login credentials remotely.

#### **Backing Up and Restoring a Company MacBook**

1. Ensure **iCloud Drive Backup** is enabled in **System Settings > Apple ID > iCloud**.
2. Use **Google Drive Sync** for backing up work documents.
3. If a laptop is replaced, restore from **iCloud Backup** during setup.

#### **Wiping a Company MacBook Before Offboarding**

1. **Back up all company data** to Google Drive or iCloud.
2. Open **System Settings > General > Transfer or Reset**.
3. Select **Erase All Content and Settings** and confirm.
4. Remove the device from **Apple Business Manager**.
5. Verify that all company accounts have been logged out before returning the laptop.

#### **Replacing a Lost or Stolen Company MacBook**

1. Report the lost device to **IT Support or Management** immediately.
2. Use **Find My Mac** to attempt tracking or remotely wipe the laptop.
3. Issue a **replacement MacBook** and follow the **new device setup SOP**.
4. Reset passwords for all accounts accessed on the lost/stolen device.

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### **2.6 Additional Hardware (Misc.)**

Additional hardware, including **printers, scanners, routers, and networking equipment**, plays a crucial role in **ensuring smooth office operations** at PS Cool Heat. These devices enable efficient document management, secure connectivity, and seamless collaboration between office and field staff.

All hardware must be **properly maintained**, regularly updated, and configured with appropriate **security measures** to prevent unauthorized access.

### **Usage:**

* **Printers & Scanners:** Used for printing work orders, invoices, and scanning signed documents into digital records.
* **Networking Equipment:** Ensures secure and stable Wi-Fi connectivity for office operations.
* **Label Printers:** Used for labeling HVAC equipment, inventory, and customer documentation.
* **External Storage Drives:** Securely stores backups and essential company data.

### **Best Practices:**

* Schedule **regular maintenance** to prevent hardware failures and downtime.
* Restrict **unauthorized access** by setting up role-based permissions.
* Use **cloud-connected printers and scanners** for streamlined document sharing.
* Implement **network security protocols** to prevent cyber threats and unauthorized Wi-Fi access.
* Maintain an **inventory log** for tracking hardware usage and replacements.

### **Standard Operating Procedures (SOPs)**

#### **Setting Up a New Printer**

1. Unbox the printer and connect it to a power source.
2. Connect to the **office network via Wi-Fi or Ethernet**.
3. Install necessary drivers from the manufacturer’s website.
4. Go to **System Settings > Printers & Scanners** and select **Add Printer**.
5. Set the printer as the **default** and enable **cloud printing** for document sharing.
6. Test print a document to confirm successful setup.

#### **Connecting a Scanner to Cloud Services**

1. Install the scanner software and connect it to the office network.
2. Open the scanning application and select **Scan to Cloud Drive (Google Drive or iCloud)**.
3. Assign default storage folders for scanned documents.
4. Test the scanning function and verify document availability in the cloud.

#### **Maintaining Office Networking Equipment**

1. **Routers & Modems:**
   * Keep firmware updated through the manufacturer’s web interface.
   * Set up **separate Wi-Fi networks** for employees and guests.
   * Change default admin credentials and enable **firewall protection**.
2. **Network Security Best Practices:**
   * Use **strong WPA3 encryption** for office Wi-Fi.
   * Set up **MAC address filtering** to allow only approved devices.
   * Perform routine **network speed tests** to diagnose connectivity issues.

#### **Label Printer Setup & Usage**

1. Connect the label printer via **USB or Wi-Fi**.
2. Install necessary software (e.g., **Dymo Label, Zebra Printer Utility**).
3. Load label rolls and adjust printer settings for size and formatting.
4. Test print labels and store preset templates for frequently used label types.

#### **Using External Storage for Secure Data Backup**

1. Connect the **external drive** to the company MacBook or Windows PC.
2. Open **Time Machine (Mac) or File History (Windows)** for backup settings.
3. Set up **automatic scheduled backups** for critical business files.
4. Encrypt the drive to ensure **secure data protection**.

#### **Routine Maintenance & Troubleshooting**

1. **Printers & Scanners:**
   * Replace ink or toner cartridges when print quality degrades.
   * Run printer head cleaning cycles as needed.
   * Restart the printer if connectivity issues arise.
2. **Network Equipment:**
   * Restart routers every **2-3 weeks** to optimize performance.
   * Check for firmware updates quarterly.
   * Reset networking hardware if persistent issues occur.
3. **External Storage Devices:**
   * Ensure backups are performed regularly.
   * Scan for errors using **Disk Utility (Mac) or Check Disk (Windows)**.
   * Store drives in **climate-controlled environments** to prevent damage.

#### **Disposing of Old Hardware Securely**

1. **Printers & Scanners:** Perform a factory reset to remove stored data.
2. **External Drives:** Wipe all data using **secure erase tools** before disposal.
3. **Networking Equipment:** Remove **Wi-Fi credentials** and reset to factory settings.
4. **Recycling & Disposal:** Follow **electronic waste disposal guidelines** or return to the manufacturer for recycling.

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### **3. Finance**

PS Cool Heat operates using a **Flat Rate Pricing** strategy, meaning that all services, labor, and materials are bundled into a single line item per unit. This pricing method simplifies invoices for customers while ensuring all necessary costs, including labor and overhead, are accounted for.

For example, if a customer is installing a **furnace**, there will be only **one line item** that includes **all parts and services** required for installation. If multiple systems are being installed (e.g., **Furnace, A/C, Water Heater**), there will be separate line items for each unit, covering all associated materials and labor.

When jobs take multiple days, **HouseCall Pro** is used to **segment** tasks, ensuring that labor hours are correctly allocated and that the appropriate amount of **overhead** is added to the **Flat Rate Pricing** model.

### **Flat Rate Pricing Formula**

Flat Rate Cost = Total Cost of Job + Markup(%)

Where:

* **Total Cost of Job** = **Cost of Materials** + **Total Labor Hours Cost**
* **Markup %** = % decided by the company × Total Cost of Job (this is the amount a Comfort Advisor can discount without disrupting overhead calculations).
* **Total Labor Hours Cost** = (Job Hours per Employee × Number of Employees) × Average Labor Rate
* **Average Labor Rate** = (Hourly Rate of Employees + Taxes) + Workers Compensation Rate per Employee
* **Markup Rate** = Total Average Labor Rate × 5% (Standard Markup)
* **Workers Compensation Rate per Employee** = (Total Yearly Workers Compensation Cost) ÷ (Number of Employees under Workers Compensation)

This calculation ensures that **labor, material, and overhead costs** are covered while maintaining a **profit margin** that supports business growth.

### **Best Practices:**

* **Ensure accurate labor tracking** in HouseCall Pro to maintain correct overhead calculations.
* **Regularly review pricing formulas** to adjust for changes in labor costs, material costs, and company overhead.
* **Use Flat Rate Pricing consistently** to maintain transparency with customers and profitability.
* **Train Comfort Advisors** on how to apply discounts while maintaining profitability margins.

### **Standard Operating Procedures (SOPs)**

#### **Using the Cost Calculator Algorithm (Google Sheets)**

1. Open the **Cost Calculator Algorithm Google Sheet**.
2. Enter the **estimated labor hours** required for the job.
3. Input the **number of employees** assigned to the job.
4. Add the **cost of materials** for the project.
5. Review the automatically generated **Total Cost, Markup, and Flat Rate Pricing**.
6. Verify that the **markup aligns with company policy** before finalizing pricing.

#### **Calculating the Average Labor Rate**

1. Collect the **hourly rates of all employees** working on the job.
2. Add **taxes and workers' compensation** to each employee’s rate.
3. Apply the **5% markup** to determine the **final average labor rate**.
4. Use this rate to calculate **Total Labor Hours Cost**.

#### **Segmenting Multi-Day Jobs in HouseCall Pro**

1. Open the **HouseCall Pro Dashboard**.
2. Select the **customer’s job ticket** and click **Edit Job**.
3. Click **Segment Job** and assign **specific tasks to different days**.
4. Ensure that each job segment **correctly reflects labor hours and materials used**.
5. Save changes and notify the scheduling team.

#### **Approving Discounts While Maintaining Overhead**

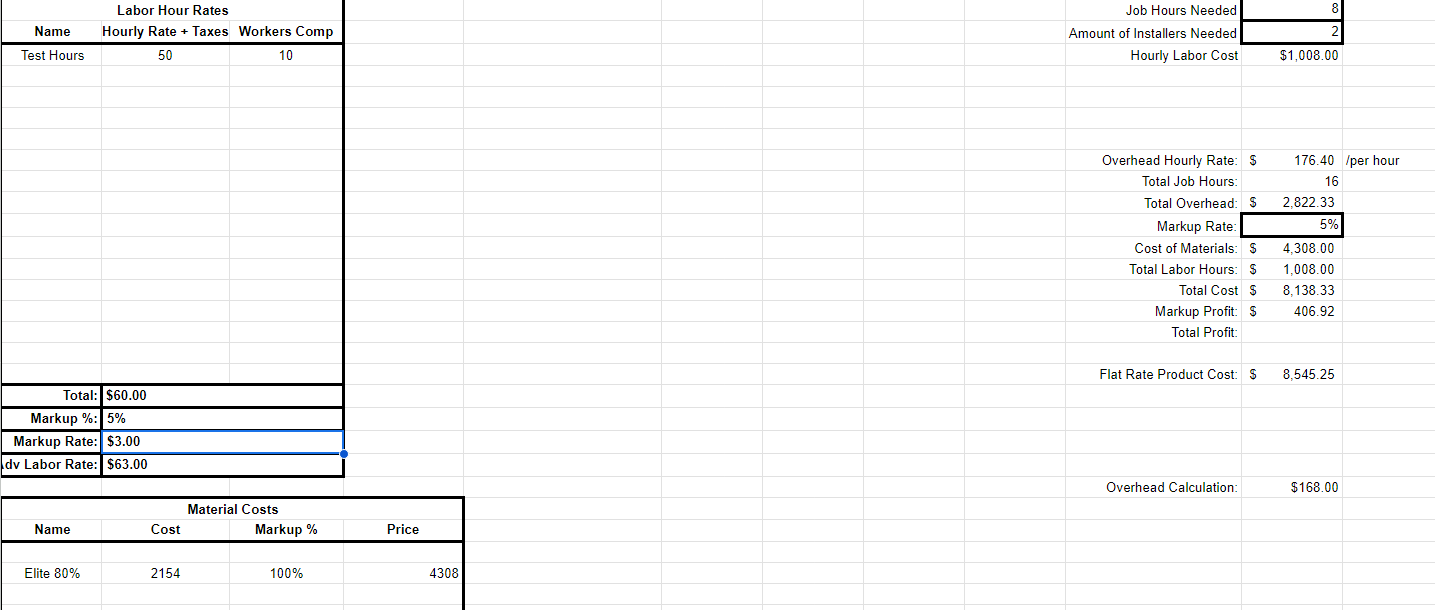
1. Comfort Advisors can discount up to **the markup percentage** without affecting overhead.
2. If a larger discount is needed, a **manager must approve** the adjustment.
3. Any **discounts must be documented** in the **HouseCall Pro estimate** notes.

#### **Reviewing Overhead Costs and Adjusting Markup**

1. **Monthly Review:** Assess overhead costs, labor rates, and material costs.
2. **Compare against previous months** to identify cost fluctuations.
3. If needed, **adjust markup percentages** to maintain profitability.

By following these procedures, **PS Cool Heat** ensures that all services remain **profitable, efficient, and transparent** for both employees and customers. Let me know if you need any modifications or additional SOPs!

You can utilize our Cost Calculator Algorithm Sheet Here: [Cost Calculator Algorithm Google Sheet](https://docs.google.com/spreadsheets/d/1qvNACcTKgpu9xAJJ7lBKJD4OC2XiF9ddn8URr9g_AQ4/edit?usp=sharing)



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### **3.1 Financing Vendors**

Partnering with **financing vendors** allows PS Cool Heat to offer customers **flexible payment options**, making HVAC services more accessible. By working with **Service Finance, Synchrony Bank, and WiseTack Financing**, the company ensures a range of **financing solutions** that cater to different customer needs, helping to **increase sales conversions** and provide **affordable payment plans**.

### **Current Financing Vendors & Benefits:**

* **Service Finance** – Best for customers looking for comprehensive financing options (requires a **hard credit pull** for approval).
* **Synchrony Bank** – Best for **low-credit customers** (only requires a **soft credit hit** to prequalify).
* **WiseTack** – Ideal for **small repair jobs**, offering quick and easy approval.

### **Best Practices:**

* **Clearly explain financing options** to customers at the point of sale.
* **Ensure compliance** with vendor agreements, regulations, and disclosure requirements.
* **Train Comfort Advisors and sales staff** on how to present financing options effectively.
* **Confirm the customer’s eligibility** before proceeding with financing applications.
* **Use financing strategically** to close sales without affecting overhead profitability.

### **Standard Operating Procedures (SOPs)**

#### **How to Offer Financing to a Customer**

1. During the estimate process, introduce financing as an **option for affordability**.
2. Explain the **benefits of financing**, such as **low monthly payments** and potential **zero-interest promotional periods**.
3. Present financing choices based on the customer’s financial profile:
   * **Service Finance** (for customers seeking comprehensive financing)
   * **Synchrony Bank** (for customers with lower credit scores)
   * **WiseTack** (for small repairs)
4. Provide a **comparison of terms, interest rates, and approval requirements**.
5. If the customer is interested, proceed with the prequalification or application process.

#### **How to Prequalify a Customer for Financing**

1. Ask the customer for **basic personal information** (name, address, date of birth).
2. For **Service Finance**, complete an application (hard credit pull required).
3. For **Synchrony Bank**, run a **soft credit check** for prequalification.
4. For **WiseTack**, send a **prequalification link** directly to the customer.
5. Review the financing offers with the customer and help them select the best option.

#### **Submitting a Financing Application**

1. Log into the respective financing vendor portal:
   * **Service Finance Portal**
   * **Synchrony Bank Dealer Portal**
   * **WiseTack Merchant Dashboard**
2. Fill out the **customer’s application** using the provided details.
3. Review the **terms, interest rates, and payment plan** with the customer.
4. Submit the application and wait for the **approval decision**.
5. If approved, provide the customer with the **contract details and payment schedule**.

#### **Finalizing the Sale with Financing**

1. Once financing is **approved**, ensure all required **paperwork and agreements** are completed.
2. Confirm that the **customer understands their payment plan** and any applicable interest rates.
3. Apply financing details to the **final invoice in HouseCall Pro**.
4. Schedule the installation or repair service based on the approved financing plan.

#### **Handling Financing-Related Customer Inquiries**

1. If a customer has **questions about payments**, direct them to the **financing vendor’s customer support**.
2. If a customer is **denied financing**, offer alternative options such as:
   * Lower-cost service plans
   * Split payment options (cash + financing)
   * Reapplying with a **co-signer**
3. If a customer requests **early payoff options**, refer them to the vendor’s **early repayment policy**.

#### **Tracking and Reporting Financing Transactions**

1. Maintain a **record of all financing approvals and denials** in HouseCall Pro.
2. Ensure **monthly reconciliation** of financed jobs in the company’s financial system.
3. Regularly review **financing vendor performance metrics** (approval rates, customer satisfaction, default risks).

By following these procedures, **PS Cool Heat** ensures a **smooth financing experience** for customers while maintaining **profitability and compliance**. Let me know if you need any modifications or additional SOPs!

**3.2 Fiscal Overview**

Understanding **PS Cool Heat’s** financial health is **crucial** for long-term success. This section provides a structured approach to monitoring **revenue, expenses, profitability, and operational efficiency** at different time intervals—**daily, weekly, monthly, quarterly, and annually**—using **HouseCall Pro and QuickBooks Online**.

By consistently tracking financial performance, **PS Cool Heat** ensures accurate decision-making, maintains profitability, and identifies growth opportunities.

### **Best Practices:**

* Use **HouseCall Pro** for **real-time job revenue tracking** and technician performance insights.
* Utilize **QuickBooks Online** for a **comprehensive financial overview** and expense tracking.
* **Reconcile accounts daily** to ensure cash flow accuracy.
* Establish a **routine financial review process** to monitor trends and prevent issues.
* Ensure **compliance with tax regulations** and maintain organized financial records.

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## **3.2.1 Daily Fiscal Overview**

### **Purpose:**

#### **To monitor daily revenue, expenses, and operational efficiency to ensure smooth financial performance.**

### **Process:**

#### **HouseCall Pro (Reporting Tab)**

#### **Generate the "Revenue Summary" report to track daily job revenue.**

#### **Review the "Technician Performance" report to assess individual productivity and efficiency.**

#### **Check the "Payments Collected" report to verify cash flow from completed jobs.**

#### **QuickBooks Online (Reports)**

#### **Review the "Profit and Loss Detail" to get a snapshot of daily financial performance.**

#### **Check "Expense Transactions" to track any new outgoing payments.**

#### **Compare bank deposits with daily sales to ensure reconciliation.**

### **Key Metrics to Track:**

#### **Total revenue for the day**

#### **Completed jobs and revenue per job**

#### **Expenses incurred (materials, labor, operational costs, etc.)**

#### **Cash flow position (incoming vs. outgoing transactions)**

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## **3.2.2 Weekly Fiscal Overview**

### **Purpose:**

To **analyze weekly performance trends**, assess expenses, and monitor accounts receivable/payable.

### **Process:**

#### **HouseCall Pro**

1. **Run the "Weekly Performance Summary" report** to track trends in job completion and revenue.
2. **Check outstanding invoices** to follow up on unpaid customer balances.
3. **Analyze technician efficiency** by reviewing completed work orders and callbacks.

#### **QuickBooks Online**

1. **Review the "Weekly Expense Breakdown"** to monitor material and labor costs.
2. **Generate the "Accounts Payable and Receivable" reports** to track pending bills and customer payments.
3. **Check for any financial discrepancies** and ensure all records are updated.

### **Key Metrics to Track:**

* **Total revenue for the week**
* **Outstanding invoices and receivables**
* **Expenses breakdown (labor, materials, overhead)**
* **Profitability trends and technician performance**

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## **3.2.3 Monthly Fiscal Overview**

### **Purpose:**

To **assess monthly financial performance, adjust budgets, and evaluate profitability**.

### **Process:**

#### **HouseCall Pro**

1. **Run the "Monthly Revenue and Job Trends" report** to analyze income fluctuations.
2. **Review customer feedback and job completion rates** to identify service quality trends.
3. **Check marketing ROI** by tracking job sources (e.g., referrals, online ads, promotions).

#### **QuickBooks Online**

1. **Review the "Monthly Profit and Loss Statement"** for a full financial overview.
2. **Check "Payroll Reports"** to ensure accurate labor cost tracking.
3. **Update the "Budget vs. Actual Report"** to compare projected and actual performance.
4. **Verify tax obligations** and ensure all necessary filings are on track.

### **Key Metrics to Track:**

* **Monthly revenue and profit margins**
* **Payroll and labor cost analysis**
* **Marketing and advertising ROI**
* **Customer acquisition and retention rates**

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## **3.2.4 Quarterly Fiscal Overview**

### **Purpose:**

To **evaluate company growth, adjust financial strategies, and prepare for tax filings**.

### **Process:**

#### **HouseCall Pro**

1. **Run the "Quarterly Business Performance" report** to assess seasonal trends.
2. **Analyze customer retention and repeat business rates**.
3. **Evaluate sales team performance** in closing jobs and upselling services.

#### **QuickBooks Online**

1. **Generate the "Quarterly Financial Statement"** to review income, expenses, and cash flow.
2. **Conduct an audit of vendor payments and operational expenses**.
3. **Ensure all tax documents are prepared** for quarterly tax filings.

### **Key Metrics to Track:**

* **Quarterly revenue and profit growth**
* **Cost of goods sold (COGS) and overhead expenses**
* **Tax liabilities and estimated payments**
* **Customer lifetime value and retention rates**

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## **3.2.5 Annual Fiscal Overview**

### **Purpose:**

To **review full-year performance, plan for business growth, and prepare for year-end financial reporting**.

### **Process:**

#### **HouseCall Pro**

1. **Review annual job completion and revenue trends**.
2. **Analyze service performance and identify areas for improvement**.
3. **Assess the effectiveness of promotions, marketing campaigns, and discounts**.

#### **QuickBooks Online**

1. **Generate the "Annual Financial Report"** for revenue, profit, and loss assessment.
2. **Prepare financial statements for tax filings and compliance**.
3. **Conduct a company-wide budget review and set financial goals for the next year**.

### **Key Metrics to Track:**

* **Total revenue and net profit for the year**
* **Annual growth rate and business expansion opportunities**
* **Tax filings and deductions**
* **Operational cost efficiency**

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## **3.2.6 Conclusion**

By leveraging **HouseCall Pro** for operational insights and **QuickBooks Online** for financial tracking, PS Cool Heat maintains a structured and efficient fiscal overview process. This ensures the company remains financially healthy, strategically agile, and prepared for future growth.

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### **4. Marketing**

## Effective marketing is essential for building brand awareness, generating leads, and establishing PS Cool Heat as a trusted HVAC service provider in the South Denver Metro Region. A consistent brand identity, combined with physical and digital marketing efforts, ensures a strong market presence and customer engagement.

### **Best Practices:**

## Maintain brand consistency across all platforms and customer interactions.

## Leverage both physical and digital marketing to reach a broader audience.

## Monitor campaign performance and adjust strategies accordingly.

## Encourage customer reviews and referrals to boost credibility.

## Stay updated on industry trends and emerging marketing techniques.

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### **4.1 Branding and Identity**

### Establishing a **strong brand identity** differentiates PS Cool Heat in a competitive HVAC market. The brand elements—including **logo, typography, color scheme, and messaging**—are used across all marketing materials to ensure a **consistent and recognizable presence**.

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### **Key Brand Elements:**

* **Logo, Typography, and Colors**
  + **Logo Variations:** Full-color, black and white, and icon-only versions.
  + **Typography:**
    - **Noto Sans - SemiBold**
    - **Muli - Black Italic**
  + **Brand Colors:**
    - #2b4141
    - #b8e1ff
    - #ff785a
    - #6369d1
    - #af3800
* **Mission Statement:**
  + **"Perfect Service, Every Time"**
* **Branding Message:**
  + **"Serving the South Denver Metro Region since 2015"**

### **Best Practices:**

* Ensure all marketing materials **follow brand guidelines**.
* **Reinforce brand identity** through service quality and customer interactions.
* Regularly **review and update branding** to stay competitive.

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## **4.2 Physical Media**

**Printed materials** remain a valuable tool for **offline marketing**, allowing for direct customer engagement and brand visibility.

### **Common Physical Marketing Materials:**

* **Business Cards** – Provided to all employees for networking and customer retention.
* **Flyers & Brochures** – Used for promotional campaigns and local advertising.
* **Direct Mail Campaigns** – Sent to targeted neighborhoods for seasonal promotions.
* **Vehicle Wraps & Signage** – Ensuring brand visibility on service vehicles.

### **Best Practices:**

* Keep **designs clean, professional, and aligned** with brand guidelines.
* Include a **clear call-to-action** on all materials (e.g., “Call Now for a Free Estimate”).
* Distribute materials **strategically** in high-traffic and target service areas.

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## **4.3 Digital Media**

A strong **online presence** is **crucial** for reaching and engaging potential customers. Digital marketing ensures **brand visibility, customer engagement, and lead generation**.

### **Key Digital Marketing Channels:**

* **Website & SEO Optimization** – A mobile-friendly, informative website with **optimized local SEO**.
* **Social Media (Facebook, Instagram, LinkedIn)** – Engaging content and promotions.
* **Email Marketing Campaigns** – Newsletters and promotional offers.
* **Google My Business & Online Reviews** – Reputation management and local SEO.

### **Best Practices:**

* Maintain a **user-friendly website** with **up-to-date service information**.
* Regularly **post engaging content** on social media platforms.
* Encourage satisfied customers to **leave positive online reviews**.
* Use **Google Ads and Facebook Ads** to **increase lead generation**.

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## **4.4 Color Schemes and Assets**

Maintaining **consistency in visual branding** enhances **brand recognition and customer trust**.

### **Brand Colors:**

* **Primary Colors:** (HEX codes listed above)
* **Secondary Colors:** Used for complementary elements in marketing materials.

### **Logo Variations:**

* **Full-color logo** – Standard use.
* **Black and white version** – For print and monochrome designs.
* **Icon-only variation** – Used for social media and branding assets.

### **Best Practices:**

* Use **consistent colors** across all **marketing platforms**.
* Ensure **high-resolution logos** are available for **print and digital use**.
* Maintain a **library of approved design assets** for marketing materials.

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## **4.5 Approved Marketing Styles**

A **cohesive marketing approach** ensures a strong brand presence **across all channels**.

### **Guidelines for Marketing Content:**

* **Tone of Voice:** **Professional, friendly, and informative**.
* **Design Aesthetic:** **Clean, modern, and easy to read**.
* **Photography Style:** **High-quality images** of services, team, and installations.

### **Best Practices:**

* Align all **marketing materials** with the company’s **brand voice and messaging**.
* Regularly **review and refresh** marketing strategies based on **performance analytics**.
* **Monitor campaign effectiveness** and adjust messaging accordingly.

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## **4.6 Standard Operating Procedures (SOPs)**

### **Creating a Marketing Campaign**

1. **Define the campaign goal** (brand awareness, promotions, customer engagement).
2. **Select the marketing channels** (digital, print, social media, email).
3. **Develop marketing materials** following brand guidelines.
4. **Launch the campaign** and track performance metrics.
5. **Adjust based on analytics** for maximum impact.

### **Managing Social Media Accounts**

1. Log into **Facebook, Instagram, LinkedIn** business accounts.
2. Create and schedule **posts, promotions, and advertisements**.
3. Respond to **customer inquiries, comments, and messages**.
4. Monitor **engagement metrics** and adjust content strategies accordingly.

### **Updating Google My Business Profile**

1. Log into **Google My Business**.
2. Update **business hours, service areas, and contact details**.
3. Add **photos and posts** to maintain an active presence.
4. Respond to **customer reviews and feedback** professionally.

### **Running a Direct Mail Campaign**

1. Select **target neighborhoods** and obtain a **mailing list**.
2. Design **professional marketing materials** (flyers, postcards).
3. Print materials with a **clear call-to-action**.
4. Distribute materials through **targeted mail services**.

### **Setting Up a Digital Ad Campaign**

1. Choose the **platform** (Google Ads, Facebook Ads, Instagram Ads).
2. Set **target demographics** based on customer data.
3. Create **ad copy and visuals** aligned with branding.
4. Monitor **click-through rates (CTR), conversions, and engagement**.
5. Optimize the campaign for **higher performance and ROI**.

By following these **structured marketing strategies and SOPs**, **PS Cool Heat** ensures a **strong, consistent brand presence** across **all marketing channels**, driving **business growth and customer engagement**. Let me know if you need modifications or additional SOPs!

**5. Training**

#### Proper training ensures PS Cool Heat employees are equipped with the skills and knowledge needed to provide top-tier service, manage operations efficiently, and maintain compliance with industry standards.

#### Training is divided into several key areas, including field management, office management, leadership development, vendor training, and HR policies. Each area includes best practices and structured learning processes to maintain a high standard of service and professionalism.

### **Best Practices:**

#### Provide ongoing education and development opportunities.

#### Implement structured onboarding and training programs for new hires.

#### Leverage vendor-sponsored training for industry certifications.

#### Establish clear Standard Operating Procedures (SOPs) for consistency.

#### Encourage mentorship and peer learning to foster skill development.

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## **5.1 Field Management**

#### Effective field management ensures that technicians work efficiently, provide quality service, and represent PS Cool Heat professionally on job sites.

### **Key Areas:**

#### Scheduling & Job Assignments – Ensuring jobs are optimized and properly staffed.

#### Quality Control & Inspections – Performing job site reviews to maintain high service standards.

#### Customer Interactions On-Site – Handling customer concerns and upselling services.

### **Best Practices:**

#### Use dispatch software (HouseCall Pro) to optimize technician schedules.

#### Train technicians on HVAC best practices and safety standards.

#### Encourage customer feedback through follow-up surveys and reviews.

### **Standard Operating Procedures (SOPs)**

#### **Assigning Jobs in HouseCall Pro**

#### Open HouseCall Pro and navigate to Job Scheduling.

#### Select an available technician based on skill level and location.

#### Assign the job and notify the technician via the mobile app.

#### Monitor real-time job status updates.

#### **Performing Job Site Quality Inspections**

#### Conduct a walkthrough of the installation or repair.

#### Verify correct system setup and installation procedures.

#### Ensure all customer questions are answered before leaving.

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## **5.2 Office Management**

#### Efficient office management supports daily operations, customer service excellence, and administrative oversight.

### **Key Responsibilities:**

#### Overseeing Administrative Tasks – Maintaining schedules, payroll, and office operations.

#### Handling Customer Service Inquiries – Ensuring timely responses to calls and emails.

#### Managing Office Supplies & Equipment – Keeping essential materials stocked.

### **Best Practices:**

#### Automate tasks where possible to improve efficiency.

#### Train staff in customer service skills for professional interactions.

#### Maintain organized digital and physical records for easy access.

### **Standard Operating Procedures (SOPs)**

#### **Handling Customer Calls Efficiently**

#### Answer calls with the company greeting: “Thank you for calling PS Cool Heat. How can we assist you today?”

#### Log the customer request in HouseCall Pro.

#### Route calls to the appropriate department (Dispatch, Sales, or Support).

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## **5.3 Management Training**

#### Developing strong leaders ensures smooth operations, team efficiency, and financial stability.

### **Key Topics:**

#### Leadership Development – Coaching and motivating teams.

#### Conflict Resolution – Managing employee disputes professionally.

#### Financial Oversight & Budgeting – Ensuring profitability and cost control.

### **Best Practices:**

#### Provide continuous education for managers and team leads.

#### Encourage mentorship and peer learning among leadership.

#### Set clear performance benchmarks for leadership roles.

### **Standard Operating Procedures (SOPs)**

#### **Conducting Team Performance Reviews**

#### Schedule quarterly check-ins with employees.

#### Provide constructive feedback on strengths and areas for improvement.

#### Set performance goals for the next quarter.

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## **5.4 Vendor-Sponsored Training**

#### PS Cool Heat partners with HVAC manufacturers and industry vendors to provide training on new equipment, best practices, and certification programs.

### **Key Benefits:**

#### Access to Manufacturer-Specific Knowledge – Training on new product lines.

#### Hands-On Equipment Training – Learning proper installation and troubleshooting.

#### Certification Programs – Enhancing credibility and expertise.

### **Best Practices:**

#### Encourage technicians to attend vendor training sessions regularly.

#### Maintain relationships with key HVAC vendors for training opportunities.

#### Keep a training log to track technician certifications.

### **Standard Operating Procedures (SOPs)**

#### **Registering for Vendor Training**

#### Check the vendor’s training calendar for available sessions.

#### Register technicians in advance to secure slots.

#### Verify attendance and certification completion.

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## **5.5 Human Resources (HR) Policies**

#### Effective HR policies create a positive work environment, ensure compliance, and maintain company standards.

### **Best Practices:**

#### Clearly define job roles and expectations.

#### Follow legal protocols for hiring, termination, and benefits.

#### Maintain proper documentation for all HR processes.

### **Standard Operating Procedures (SOPs)**

#### **5.5.1 Hiring Employees**

#### Develop a clear job description and qualifications.

#### Use a structured interview process.

#### Conduct background checks and reference verifications.

#### **5.5.2 Firing Employees**

#### Follow legal termination protocols.

#### Provide clear documentation and reasons for dismissal.

#### Conduct exit interviews to gather feedback.

#### **5.5.3 Onboarding & Offboarding Employees**

#### **Onboarding:**

#### Provide new hires with training materials and equipment.

#### Assign a mentor or supervisor for guidance.

#### **Offboarding:**

#### Collect all company property (laptops, uniforms, etc.).

#### Remove system access and accounts.

#### **5.5.4 Employment Contracts**

#### Define job roles, expectations, and compensation.

#### Outline confidentiality and non-compete agreements.

#### Clarify benefits and employment terms.

#### **5.5.5 W2 vs. 1099 Employees**

#### Ensure compliance with IRS classifications.

#### Maintain proper tax documentation.

#### Understand differences in benefits and obligations.

#### **5.5.6 Employee Benefits**

#### Offer competitive benefits packages.

#### Educate employees on health, retirement, and leave policies.

#### Regularly review benefits programs for competitiveness.

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## **5.6 Standard Operating Procedures (SOPs) Documentation**

#### SOPs ensure consistency and efficiency across all business operations.

### **Best Practices:**

#### Document all essential processes for training and reference.

#### Regularly update SOPs based on industry changes and company needs.

#### Train employees on proper procedures and compliance.

### **Standard Operating Procedures (SOPs)**

#### **Updating SOP Documentation**

#### Review existing procedures quarterly.

#### Make updates based on new technology, policies, or feedback.

#### Train employees on any revisions.

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## **5.7 IT & Technical Administration**

#### Proper IT management ensures secure system access, cybersecurity, and technical support.

### **Best Practices:**

#### Manage employee access to company software.

#### Implement cybersecurity measures to prevent threats.

#### Regularly update hardware and software infrastructure.

### **Standard Operating Procedures (SOPs)**

#### **Managing Employee System Access**

#### Assign software accounts based on job roles.

#### Update access permissions as needed.

#### Disable accounts immediately upon employee departure.

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### **6. Customer Service & Sales**

Providing exceptional **customer service and a structured sales process** is critical to **building long-term customer relationships, increasing revenue, and maintaining a strong brand reputation**. **PS Cool Heat** prioritizes **customer satisfaction, transparent pricing, and ongoing service agreements** to ensure a seamless experience for all clients.

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## **6.1 Customer Service Best Practices**

Outstanding customer service is the foundation of **customer loyalty and repeat business**. A **positive service experience** can turn first-time customers into long-term clients and brand advocates.

### **Key Principles:**

* **Active Listening** – Ensure customers feel heard and understood.
* **Clear & Concise Communication** – Avoid jargon and provide easy-to-understand solutions.
* **Quick Response Times** – Address customer inquiries and service requests promptly.

### **Best Practices:**

* **Train staff** on effective communication techniques.
* Use **CRM tools** (HouseCall Pro) to **track and manage customer interactions**.
* Implement **follow-up calls or emails** to ensure customer satisfaction.

### **Standard Operating Procedures (SOPs)**

#### **Handling Customer Inquiries via Phone or Email**

1. **Answer calls within three rings** with the company greeting:
   * **“Thank you for calling PS Cool Heat. How can we assist you today?”**
2. **Log all customer inquiries** in HouseCall Pro under the appropriate job or service request.
3. **Provide accurate information** and **set clear expectations** for service timelines.
4. If an issue cannot be resolved immediately, **escalate it to the appropriate department**.
5. **Follow up** within 24 hours to confirm resolution.

#### **Customer Follow-Up Procedures**

1. **After a job is completed**, send a follow-up email or call within **48 hours**.
2. Ask if the customer is **satisfied with the service** and if they have any further questions.
3. Encourage **leaving an online review** to help build company credibility.

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## **6.2 Sales Process & Pricing Strategies**

A **structured sales process and transparent pricing strategy** ensure **consistent revenue growth and customer trust**.

### **Key Steps in the Sales Process:**

1. **Identify Customer Needs** – Ask questions to understand their HVAC requirements.
2. **Present Solutions** – Offer clear options, highlighting the benefits of each.
3. **Provide Transparent Pricing** – Show a **detailed estimate** with no hidden fees.
4. **Offer Financing Options** – Help customers afford services through flexible payment plans.
5. **Close the Sale** – Secure customer commitment and schedule the job.

### **Best Practices:**

* **Maintain pricing transparency** to establish trust.
* **Train sales teams** on consultative selling techniques.
* **Offer financing options** to make services more accessible.

### **Standard Operating Procedures (SOPs)**

#### **Creating an Estimate in HouseCall Pro**

1. Open **HouseCall Pro** and create a new estimate.
2. Enter the **customer details** and service location.
3. Select the appropriate **flat-rate pricing model** for the job.
4. Include any **add-ons, discounts, or financing options**.
5. Review and finalize the estimate before sending it to the customer.

#### **Closing a Sale & Scheduling a Job**

1. Confirm the **customer’s decision** and secure approval for the estimate.
2. Collect any **required deposit** to confirm the appointment.
3. Schedule the job in **HouseCall Pro** based on technician availability.
4. Provide the customer with **a confirmation email and appointment details**.

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## **6.3 Handling Customer Complaints**

**Effectively addressing complaints** can turn **negative experiences into customer retention opportunities**. **PS Cool Heat** aims to resolve issues **quickly and professionally** while maintaining **customer satisfaction and company reputation**.

### **Key Steps in Handling Complaints:**

1. **Acknowledge the Issue** – Listen actively and show empathy.
2. **Investigate & Offer a Resolution** – Gather details and take corrective action.
3. **Follow Up** – Ensure the customer is satisfied with the resolution.

### **Best Practices:**

* Maintain a **complaint log** to track and identify trends.
* Train staff in **de-escalation techniques** for difficult customer interactions.
* Offer **discounts or service incentives** when necessary to retain customers.

### **Standard Operating Procedures (SOPs)**

#### **Handling a Customer Complaint Call**

1. **Listen without interruption** and acknowledge the customer’s frustration.
2. **Take notes** and ask clarifying questions.
3. If the issue is **job-related**, check the **HouseCall Pro job notes**.
4. If immediate resolution is not possible, **escalate the issue** to management.
5. Follow up within **24-48 hours** to confirm resolution.

#### **Offering a Service Discount or Incentive**

1. Determine if the **issue warrants a discount or incentive**.
2. Apply a **discount code** or offer **a free maintenance check-up**.
3. Log the discount in **HouseCall Pro** under customer notes.

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## **6.4 Service Agreements & Maintenance Plans**

Service agreements provide **ongoing customer support** while creating **steady revenue streams** for the business.

### **Key Benefits:**

* **Extends Equipment Lifespan** – Regular maintenance prevents system failures.
* **Reduces Emergency Repair Costs** – Helps customers avoid expensive, unexpected repairs.
* **Ensures Recurring Revenue** – Provides consistent income for the business.

### **Best Practices:**

* Clearly define the **terms, pricing, and benefits** of each service plan.
* Offer **tiered service plans** to fit different customer budgets.
* Provide **discounts or priority service benefits** to incentivize enrollments.

### **Standard Operating Procedures (SOPs)**

#### **Selling a Maintenance Plan**

1. **Introduce the plan** as part of the sales or service visit.
2. Explain the **benefits** of regular maintenance (energy savings, fewer repairs, priority scheduling).
3. Offer **tiered options** (e.g., Basic, Standard, and Premium Plans).
4. If the customer agrees, enroll them via **HouseCall Pro**.
5. **Schedule their first maintenance visit** upon sign-up.

#### **Renewing a Customer’s Maintenance Plan**

1. Generate a **list of expiring maintenance plans** in **HouseCall Pro**.
2. Call or email the customer **30 days before expiration**.
3. Offer a **renewal discount** or loyalty incentive.
4. Process the renewal and schedule their **next service visit**.

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## **Conclusion**

By following structured **customer service and sales processes**, **PS Cool Heat** ensures:  
✅ **Satisfied customers who return for future services**.  
✅ **Higher sales conversion rates through transparent pricing and financing**.  
✅ **Long-term revenue growth via service agreements**.

Let me know if you need **modifications** or **additional SOPs**!

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## **7. Operations & Service Procedures**

Efficient operations and service procedures **ensure timely service, cost-effective inventory management, and optimal technician performance**. This section outlines best practices for **scheduling, inventory management, equipment maintenance, and fleet operations**, ensuring **PS Cool Heat** delivers high-quality HVAC services consistently.

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## **7.1 Scheduling & Dispatching Best Practices**

Efficient scheduling and dispatching **maximize technician productivity, minimize delays, and enhance customer satisfaction**.

### **Key Practices:**

* Use **HouseCall Pro** to efficiently assign jobs to technicians.
* Prioritize **emergency calls** while balancing **routine maintenance jobs**.
* Optimize **routes** to reduce **travel time and fuel costs**.

### **Best Practices:**

* Implement **real-time GPS tracking** for dispatch efficiency.
* Maintain **clear communication** between dispatchers and technicians.
* Use **automated reminders** for customer appointment confirmations.

### **Standard Operating Procedures (SOPs)**

#### **Assigning a Job in HouseCall Pro**

1. Open **HouseCall Pro** and navigate to **Job Scheduling**.
2. Assign the job based on **technician availability and location**.
3. Send a **confirmation text and email** to the customer.
4. Update the job status as **"Scheduled"** and notify the technician.

#### **Handling Emergency Service Calls**

1. Prioritize **urgent repair requests** over routine maintenance jobs.
2. Identify the **closest available technician** and reassign the job if necessary.
3. Notify the technician and provide **job details and location**.
4. Update the job as **“Emergency”** in HouseCall Pro.

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## **7.2 Inventory & Supply Chain Management**

Proper inventory management **reduces costs and prevents service delays** by ensuring that technicians have the necessary parts for repairs and installations.

### **Key Areas:**

* **Tracking inventory levels** for frequently used HVAC parts.
* **Building relationships with reliable suppliers** for timely restocking.
* **Managing stock levels** to avoid shortages or overstocking.

### **Best Practices:**

* Use **inventory management software** to maintain accurate stock records.
* Conduct **monthly inventory audits** to identify discrepancies.
* Implement a **restocking system** for critical HVAC parts.

### **Standard Operating Procedures (SOPs)**

#### **Checking Inventory Levels**

1. Log into the **inventory management system**.
2. Review **low-stock items** and place orders as needed.
3. Check **inventory transfer requests** from technicians.

#### **Reordering Supplies**

1. Identify **critical HVAC parts that need replenishment**.
2. Contact **approved suppliers** and place orders.
3. Verify and document **received inventory**.

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## **7.3 Equipment & Tool Management**

### Maintaining HVAC tools and equipment ensures technician efficiency and job site safety.

### **Key Responsibilities:**

### Conducting regular maintenance and calibration of tools.

### Assigning specific tools to technicians for accountability.

### Keeping a tool log for usage, repairs, and replacements.

### **Best Practices:**

### Train technicians on proper tool usage and maintenance.

### Schedule quarterly inspections for company tools.

### Invest in high-quality tools to minimize breakdowns and replacements.

### **Standard Operating Procedures (SOPs)**

#### **Issuing Tools to Technicians**

### Assign tools via the equipment tracking system.

### Require technicians to sign off on issued tools.

### Perform routine tool inspections to check for damage.

#### **Handling Tool Repairs & Replacements**

### If a tool is damaged, report the issue to operations management.

### Submit a repair request or authorize a replacement.

### Log the repair or replacement cost in the tracking system.

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## **7.4 Fleet Management & Vehicle Maintenance**

Company vehicles **are essential for field operations** and must be **properly maintained** to ensure reliability, safety, and efficiency.

### **Key Considerations:**

* Monitoring **vehicle condition and scheduling regular maintenance**.
* Tracking **fuel efficiency and mileage**.
* Ensuring compliance with **safety regulations and insurance policies**.

### **Best Practices:**

* Use a **fleet tracking system** to monitor vehicle locations and performance.
* Implement a **routine vehicle maintenance schedule**.
* Train technicians on **safe driving practices and fuel efficiency**.

### **Standard Operating Procedures (SOPs)**

#### **Performing Routine Vehicle Inspections**

1. Conduct **weekly vehicle inspections** for tire pressure, oil levels, and brake performance.
2. Report any **issues or maintenance needs** to fleet management.
3. Schedule routine **oil changes and system checks** every 5,000 miles.

#### **Tracking Vehicle Fuel Usage**

1. Require technicians to **log fuel receipts** after each refill.
2. Compare **mileage logs** with fuel expenses.
3. Identify **any irregular fuel consumption trends** for potential issues.

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### **8. Compliance & Legal**

## Ensuring **compliance with licensing, safety regulations, insurance requirements, and industry standards** is essential for PS Cool Heat to operate **legally, safely, and professionally**. This section outlines key compliance areas and **best practices to maintain regulatory adherence** and **reduce liability risks**.

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## **8.1 Licensing & Permits**

Proper licensing and permits **ensure legal operation and compliance with local, state, and federal regulations**. Failure to maintain valid licenses can result in **penalties, fines, or suspension of business operations**.

### **Key Requirements:**

* **HVAC Contractor Licenses** – Obtain and renew licenses per **state requirements**.
* **EPA Certifications** – Maintain **Section 608 Certification** for handling refrigerants.
* **Local Business Permits & Zoning Approvals** – Ensure compliance with **municipal and state regulations**.

### **Best Practices:**

* Keep all **licenses and permits up to date** and **stored in an accessible location**.
* Regularly **review regulatory changes** in the HVAC industry.
* Assign a **compliance officer** to monitor **permit renewals and documentation**.

### **Standard Operating Procedures (SOPs)**

#### **Renewing an HVAC Contractor License**

1. Verify **state renewal requirements** for HVAC licenses.
2. Submit renewal application **before expiration dates**.
3. Ensure all required **continuing education credits** are completed.
4. Maintain a digital and physical copy of the renewed license.

#### **Applying for a New Business Permit**

1. Contact the **local city or county office** to verify permitting requirements.
2. Complete the **business permit application** with all required documents.
3. Pay applicable **permit fees** and await approval.

## **8.2 Safety Regulations & OSHA Compliance**

Ensuring workplace **safety and compliance with OSHA (Occupational Safety and Health Administration) standards** is critical to **protecting employees, reducing liability, and maintaining operational efficiency**.

### **Key Areas:**

* **Personal Protective Equipment (PPE)** – Ensure proper safety gear for field technicians.
* **Fall Protection & Confined Space Safety** – Follow OSHA guidelines for working at heights or in tight spaces.
* **Handling Hazardous Materials & Chemicals** – Maintain **MSDS (Material Safety Data Sheets)** for refrigerants and chemicals.

### **Best Practices:**

* Conduct **regular safety training** and certification updates.
* Maintain detailed **records of safety incidents** and **corrective actions taken**.
* Implement a **safety committee** to oversee **compliance initiatives and training programs**.

### **Standard Operating Procedures (SOPs)**

#### **Performing a Job Site Safety Check**

1. Verify the **use of required PPE** (gloves, goggles, respirators, harnesses, etc.).
2. Check for **hazardous materials** and ensure proper handling procedures are followed.
3. Identify potential **fall hazards** and confirm safety measures are in place.
4. Review **emergency protocols** with all technicians before starting the job.

#### **Handling Refrigerants Safely**

1. Only **EPA-certified technicians** are permitted to handle refrigerants.
2. Use **approved recovery machines** to safely extract refrigerants.
3. Store refrigerant containers **upright in designated secure areas**.

## **8.3 Insurance Requirements**

Proper **insurance coverage minimizes financial risk** and ensures **legal protection** for PS Cool Heat’s operations, employees, and customers.

### **Required Insurance Policies:**

* **General Liability Insurance** – Covers **property damage and customer injuries**.
* **Workers' Compensation Insurance** – Protects employees from **work-related injuries**.
* **Commercial Vehicle Insurance** – Covers **company-owned vehicles** and fleet accidents.

### **Best Practices:**

* Regularly **review insurance policies** to ensure adequate coverage.
* Work with an **insurance advisor** to assess risk management strategies.
* Ensure all **employees and vehicles are covered** under appropriate policies.

### **Standard Operating Procedures (SOPs)**

#### **Filing an Insurance Claim**

1. **Document the incident** (photos, witness statements, and reports).
2. Contact the **insurance provider** and submit a claim form.
3. Provide all **required documentation** for claim processing.
4. Follow up with the **insurance adjuster** for claim status updates.

#### **Verifying Employee Workers’ Compensation Coverage**

1. Maintain an updated **employee roster** for coverage verification.
2. Report **any workplace injuries** to the insurance provider immediately.
3. Ensure injured employees **receive proper medical care** and follow return-to-work policies.

## **8.4 HVAC Industry Standards & Best Practices**

Adhering to **industry standards** ensures **quality service, compliance, and customer trust**.

### **Key Industry Standards:**

* **ASHRAE Standards** – Industry best practices for **heating, ventilation, and air conditioning**.
* **ACCA Guidelines** – Standards for **HVAC system design and installation**.
* **NFPA Codes** – Fire and electrical safety codes for HVAC systems.

### **Best Practices:**

* Stay updated on **industry advancements and regulatory updates**.
* Train employees on **the latest HVAC technologies and best practices**.
* Participate in **industry associations** for networking and compliance insights.

### **Standard Operating Procedures (SOPs)**

#### **Ensuring Compliance with ASHRAE Standards**

1. Review the **latest ASHRAE regulations** applicable to HVAC installations.
2. Train technicians on **proper system design and efficiency guidelines**.
3. Conduct **random compliance checks** on completed installations.

#### **Conducting an HVAC Installation Quality Inspection**

1. Verify that **all installation procedures align with ACCA and ASHRAE standards**.
2. Ensure proper **airflow, refrigerant charge, and system balancing**.
3. Document and **certify compliance for warranty validation**.

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## **9. Key Contacts & Vendor List**

### **Suppliers & Distributors**

Maintaining relationships with reliable suppliers ensures access to quality parts and equipment.

**Key Suppliers and Vendors:**

| **Vendor** | **City** | **Website** | **Phone Number** |
| --- | --- | --- | --- |
| Lennox | Centennial | Lennoxpros.com | 720-531-1678 |
| Lennox | Denver | Lennoxpros.com | 303-218-7100 |
| Sid Harvey | Centennial | Sidharvey.com | 303-649-9800 |
| Geary Pacific | Centennial | GearyPacific.com | 303-934-2525 |
| GA Larson | Denver | Galarson.com | 303-892-1550 |
| Comfort Air | Englewood | ComfortAirDistributing.com | 303-690-0901 |
| Johnstone Supply | Denver | Johnstonesupply.com | 303-573-5626 |
| Lohmiller / Carrier | Englewood | lohmillercompany.com | 303-371-1244 |
| Sally Brewer - Lennox | Colorado | www.lennoxpros.com | 720-203-0728 |

**Best Practices:**

* + Regularly review supplier agreements for cost-effectiveness.
  + Maintain an updated list of alternative suppliers for emergencies.
  + Establish long-term partnerships for better pricing and priority service.

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### **Warranty & Parts Replacements**

Having a streamlined process for warranty claims and part replacements improves efficiency.

**Key Warranty Providers:**

| **Vendor** | **Website** | **Phone Number** |
| --- | --- | --- |
| Rheem | www.rheem.com | 800-621-5622 |
| Lennox | www.lennoxpros.com | 800-953-6669 |
| AprilAire | www.aprilaire.com | 800-334-6011 |
| Nevien | www.navieninc.com | 800-519-8794 |
| Trane | www.trane.com | 855-260-2975 |
| General Electric Appliance Services | www.geappliances.com | 800-432-2737 |
| Bradford White | www.bradfordwhite.com | 800-531-2111 |
| Mitsubishi Electric | www.mitsubishicomfort.com | 800-433-4822 |
| American Home Shield | www.ahs.com | 888-682-1043 |
| Liberty Home Guard | www.libertyhomeguard.com | 929-463-9331 |
| Select Home Warranty | www.selecthomewarranty.com | 855-267-3532 |
| AFC Home Warranty | www.afchomeclub.com | 855-613-4555 |

**Best Practices:**

* + Keep track of warranty expiration dates and conditions.
  + Train staff on how to process warranty claims quickly.
  + Maintain an inventory of frequently replaced parts for faster service.

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### **Financing & Insurance Partners**

Partnering with financial institutions ensures customers have access to flexible payment options.

**Key Partners:**

| **Vendor** | **Website** | **Phone Number** |
| --- | --- | --- |
| Service Finance | www.svcfin.com | 866-254-0497 |
| WiseTack Financing | www.wisetack.com | 833-927-0333 |
| Synchrony Merchant Services | www.synchronybusiness.com | 800-333-1082 |

**Best Practices:**

* + Offer multiple financing options to accommodate different customer needs.
  + Work closely with insurance providers to streamline claims processing.
  + Educate customers on available financial assistance programs.

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### **Emergency Service Contacts**

A list of emergency contacts helps in handling urgent situations efficiently.

**Key Emergency Contacts:**

| **Contact** | **City** | **Phone Number** |
| --- | --- | --- |
| South Metro Fire Station 18 | Highlands Ranch | 303-795-3800 |
| Douglas County Sheriff | Highlands Ranch | 303-660-7505 |

**Best Practices:**

* + Ensure all employees have access to the emergency contact list.
  + Conduct regular emergency drills and preparedness training.
  + Keep alternative contacts for backup in case of unavailability.

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### **10. Crisis & Contingency Planning**

Unforeseen **crises and emergencies** can disrupt **operations, staff availability, IT systems, and business continuity**. Having a **structured contingency plan** ensures that **PS Cool Heat** can **respond efficiently, minimize downtime, and maintain service quality**.

## **10.1 Handling Equipment Failures**

Unexpected **equipment failures** can **delay service calls, increase costs, and impact customer satisfaction**. A proactive **equipment failure response plan** minimizes downtime and ensures uninterrupted operations.

### **Key Considerations:**

* Maintain a **list of backup equipment and tools** available for emergencies.
* Establish **relationships with emergency equipment suppliers** for rapid replacements.
* Train staff on **troubleshooting and quick repairs** for critical HVAC tools.

### **Best Practices:**

* Conduct **regular maintenance checks** to prevent failures.
* Keep a **record of common equipment failures and resolutions** for quick reference.
* Implement a **rapid-response team** to address urgent equipment issues.

### **Standard Operating Procedures (SOPs)**

#### **Reporting and Replacing Faulty Equipment**

1. If equipment fails, **log the issue** in the equipment tracking system.
2. Determine if the issue requires **immediate replacement or repair**.
3. If a replacement is needed, check **backup inventory** for available tools.
4. If no backup is available, **contact an emergency supplier** for expedited delivery.
5. Record the failure in the **equipment log** for tracking trends and prevention.

#### **Performing Emergency Equipment Repairs**

1. Conduct an **initial troubleshooting assessment**.
2. If the issue is minor, attempt an **on-site repair** using available tools.
3. If the issue is major, **report it to management** and request replacement.

## **10.2 Managing Staff Shortages**

Staff shortages can impact **daily operations, customer service, and job scheduling**. Having a **contingency plan** in place ensures that **essential roles are covered** and service quality remains unaffected.

### **Key Strategies:**

* **Cross-train employees** to cover multiple roles when needed.
* Develop an **on-call system** for emergency staffing.
* Maintain a **list of qualified temporary contractors** to provide backup support.

### **Best Practices:**

* Monitor **staff availability** and **adjust schedules accordingly**.
* Offer **incentives or overtime pay** for employees willing to take extra shifts.
* Keep an **emergency contact list** for temporary staffing solutions.

### **Standard Operating Procedures (SOPs)**

#### **Emergency Staff Reassignment**

1. Assess **which roles are impacted** by the staff shortage.
2. Identify **cross-trained employees** who can temporarily fill the role.
3. Update **job assignments** in **HouseCall Pro** and notify affected employees.
4. If internal coverage is not possible, **contact a temporary contractor**.

#### **Activating the On-Call System**

1. Maintain a **weekly rotation schedule** for on-call technicians.
2. In case of an urgent need, **call the on-call employee first**.
3. If the on-call employee is unavailable, **move to the backup list**.
4. If no internal staff is available, reach out to **pre-approved temp workers**.

## **10.3 IT Disaster Recovery Plan**

Protecting **critical IT systems, customer data, and internal business operations** from cyber threats or system failures is **essential** for operational continuity.

### **Key Components:**

* **Regular data backups** stored in **secure cloud storage**.
* A **documented recovery process** for major system failures.
* **Cybersecurity measures** to prevent breaches and ransomware attacks.

### **Best Practices:**

* **Test recovery procedures** quarterly to ensure effectiveness.
* Implement **access controls** to protect sensitive customer data.
* Maintain a **contact list** for IT support and cybersecurity experts.

### **Standard Operating Procedures (SOPs)**

#### **Responding to IT System Failures**

1. Identify the **cause of failure** (software issue, hardware issue, cyberattack).
2. Notify the **IT team or designated administrator** immediately.
3. If critical data is lost, initiate **data recovery from the latest cloud backup**.
4. If a cyberattack is suspected, **disconnect affected systems** from the network.
5. Restore system functionality and **document the incident** for future prevention.

#### **Performing a Cybersecurity Audit**

1. Review **employee access logs** for unauthorized login attempts.
2. Scan for **malware, phishing threats, and vulnerabilities**.
3. Update **security software and firewalls** as needed.
4. Provide **employee cybersecurity training** on identifying threats.

## **10.4 Business Continuity Planning**

A **Business Continuity Plan (BCP)** ensures **PS Cool Heat can resume operations quickly** after an unexpected disruption such as **natural disasters, economic downturns, or operational crises**.

### **Key Elements:**

* Identifying **critical business functions** and operational dependencies.
* Creating **contingency strategies** for various disruption scenarios.
* Establishing **emergency communication protocols**.

### **Best Practices:**

* Regularly **update and test the continuity plan** to address new risks.
* Conduct **employee training** on emergency procedures.
* Keep **detailed crisis response documentation** for quick reference.

### **Standard Operating Procedures (SOPs)**

#### **Responding to a Business Disruption**

1. **Assess the impact** of the disruption (equipment failure, staffing shortage, IT outage).
2. Activate the **emergency response plan** for the affected department.
3. Notify all **employees and stakeholders** about the situation.
4. Follow **pre-established contingency steps** (e.g., use backup equipment, deploy temp workers).
5. Document the event and **conduct a post-crisis review** to improve future responses.

#### **Emergency Customer Communication Plan**

1. In case of service disruption, **notify affected customers** via phone, email, or SMS.
2. Provide an **estimated resolution time** and alternative solutions.
3. Offer **discounts or rescheduling options** to maintain customer trust.

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### **11. Technology & Innovation**

The **HVAC industry** is rapidly evolving with **smart home integration, AI-driven automation, and cybersecurity advancements**. **PS Cool Heat** remains competitive by adopting **cutting-edge technology, training employees on emerging innovations, and ensuring digital security**.

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## **11.1 Smart Home Integration & Emerging Tech**

### Advancements in smart home technology are transforming HVAC systems, making them more energy-efficient, automated, and user-friendly. Smart HVAC devices improve customer experience, reduce energy costs, and enhance climate control precision.

### **Key Innovations:**

### Smart Thermostats – Devices like Nest, Ecobee, and Honeywell adjust temperature settings based on user preferences and schedules.

### IoT-Connected HVAC Units – Enables remote diagnostics, automatic alerts, and real-time system monitoring.

### Voice Assistant Integration – Allows customers to control HVAC settings via Amazon Alexa, Google Home, or Apple HomeKit.

### **Best Practices:**

### Train technicians on installing and configuring smart home devices.

### Educate customers on the benefits of smart HVAC solutions to increase sales.

### Stay updated on emerging trends to remain competitive in the industry.

### **Standard Operating Procedures (SOPs)**

#### **Installing a Smart Thermostat**

### Turn off power to the HVAC system at the breaker.

### Remove the old thermostat and label wires.

### Connect and install the new smart thermostat following manufacturer instructions.

### Download and configure the thermostat’s mobile app.

### Train the customer on how to adjust settings and schedules.

#### **Setting Up HVAC Systems for Smart Home Integration**

### Ensure the HVAC unit is compatible with IoT connectivity.

### Connect the system to the Wi-Fi network.

### Enable smart home integration via the thermostat or HVAC control panel.

### Link the system to Amazon Alexa, Google Home, or Apple HomeKit.

### Demonstrate voice command functions to the customer.

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## **11.2 AI & Automation in HVAC**

Artificial intelligence and automation are **revolutionizing HVAC operations**, from **predictive maintenance to energy efficiency management**.

### **Key Applications:**

* **AI-Powered Predictive Maintenance** – Uses machine learning to detect potential failures **before they occur**, reducing downtime.
* **Automated Climate Control** – Smart HVAC systems adjust settings **based on occupancy, weather forecasts, and energy efficiency goals**.
* **AI-Driven Customer Support** – Chatbots and virtual assistants **handle common customer inquiries** and service scheduling.

### **Best Practices:**

* Invest in **AI-driven tools** for improved **diagnostics and repairs**.
* Use **automation to reduce energy consumption and operational costs**.
* Train employees on **how to leverage AI-powered solutions effectively**.

### **Standard Operating Procedures (SOPs)**

#### **Using AI-Powered Diagnostics**

1. Connect the HVAC system to the **diagnostic AI software**.
2. Run an **automated system scan** to detect inefficiencies or potential failures.
3. Review AI-generated **performance reports and recommendations**.
4. Implement suggested repairs or optimizations.

#### **Setting Up an AI-Powered Smart HVAC System**

1. Install the **smart thermostat or control system**.
2. Configure AI learning settings to **analyze occupancy and usage patterns**.
3. Integrate the system with **automated scheduling and remote monitoring tools**.
4. Review **monthly energy usage reports** with the customer.

## **11.3 Best Practices for Software Updates & Security**

Keeping HVAC software and digital tools **secure** is critical to **protecting business and customer data**. Outdated software and weak security measures **increase the risk of cyberattacks and data breaches**.

### **Key Security Measures:**

* **Regular Software Updates** – Apply updates **immediately** to patch vulnerabilities.
* **Multi-Factor Authentication (MFA)** – Require **two-step verification** for all system logins.
* **Data Encryption** – Protect customer and business data from unauthorized access.

### **Best Practices:**

* Establish a **cybersecurity policy** for all employees.
* Schedule **routine software audits and security assessments**.
* Use **cloud-based solutions** with built-in security features.

### **Standard Operating Procedures (SOPs)**

#### **Updating HVAC Software & Systems**

1. Check for **software updates** on all connected HVAC devices.
2. Install **firmware updates** provided by manufacturers.
3. Test systems after updating to **ensure proper functionality**.

#### **Implementing Cybersecurity Best Practices**

1. Enforce **multi-factor authentication (MFA)** for system access.
2. Use **strong, unique passwords** for all company accounts.
3. Train employees on **phishing prevention and cybersecurity awareness**.
4. Encrypt **sensitive customer and business data** stored in the cloud.

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### **12. Company Organization & Organizational Practices**

A **well-structured company organization** promotes **efficiency, accountability, and team collaboration**. Establishing **clear job roles, standard operating procedures (SOPs), and performance tracking systems** ensures that **PS Cool Heat** operates smoothly and continues to grow.

**12.1 Organizational Structure**

A well-defined **company structure** ensures that **roles, responsibilities, and accountability** are clearly understood across all departments.

### **Key Components:**

* **Leadership Roles & Their Functions** – Defines **executive, management, and supervisor responsibilities**.
* **Departmental Breakdown** – Outlines reporting structures **for operations, sales, customer service, and field teams**.
* **Communication Channels** – Ensures **clear lines of communication between teams and leadership**.

### **Best Practices:**

* Maintain an **up-to-date organizational chart**.
* Clearly define **job roles and responsibilities** for all employees.
* Regularly **review and adjust the structure** based on business growth.

### **Standard Operating Procedures (SOPs)**

#### **Updating the Organizational Chart**

1. **Review the current structure** to ensure accuracy.
2. Add or modify positions as **business needs evolve**.
3. Distribute the updated chart to **all employees**.

#### **Defining Job Responsibilities**

1. Outline the **key duties** and expectations for each role.
2. Ensure each role has a **clear chain of command**.
3. Communicate responsibilities during **onboarding and training**.

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## **12.2 Standard Operating Procedures (SOPs)**

SOPs **provide consistency, efficiency, and accountability** in daily operations. These standardized processes help ensure **uniform service delivery and streamlined internal workflows**.

### **Key SOPs:**

* **Customer Service Procedures** – How to handle **inquiries, complaints, and service scheduling**.
* **Equipment Installation & Maintenance Workflows** – Ensuring **technicians follow proper installation and repair procedures**.
* **Employee Onboarding & Offboarding Protocols** – Structured **hiring, training, and termination processes**.

### **Best Practices:**

* **Document all essential workflows** and update regularly.
* **Train employees on SOP compliance** for consistency.
* **Use SOPs as a reference guide** for maintaining service quality.

### **Standard Operating Procedures (SOPs)**

#### **Creating & Updating SOPs**

1. Identify a **core process** that requires documentation.
2. **Write clear, step-by-step instructions** for employees to follow.
3. **Test the procedure** in real-world scenarios to ensure effectiveness.
4. Update SOPs **quarterly** based on **new technology or industry changes**.

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## **12.3 Employee Communication & Team Collaboration**

Effective **internal communication** fosters **team collaboration, reduces misunderstandings, and improves operational efficiency**.

### **Key Strategies:**

* **Regular Team Meetings** – Weekly or monthly discussions to **align goals and expectations**.
* **Use Internal Communication Tools** – Platforms like **Slack, Microsoft Teams, or Google Chat** to keep teams connected.
* **Establish Open-Door Policies** – Leadership should be accessible for **employee feedback and concerns**.

### **Best Practices:**

* **Promote transparency** in company decisions.
* Encourage **cross-department collaboration** for problem-solving.
* Train employees on **effective communication techniques**.

### **Standard Operating Procedures (SOPs)**

#### **Conducting Effective Team Meetings**

1. **Set a clear agenda** before the meeting.
2. Assign a **moderator** to keep discussions focused.
3. Allow time for **employee feedback and Q&A**.
4. Document meeting notes and **send follow-up action items**.

#### **Handling Internal Communications**

1. Use **Slack or Microsoft Teams** for quick team updates.
2. Keep **email communication concise and to the point**.
3. Encourage employees to **escalate urgent issues through proper channels**.

## **12.4 Performance Metrics & Accountability**

Tracking **performance metrics** ensures **business success and employee growth**. Establishing **key performance indicators (KPIs)** allows the company to measure **efficiency, service quality, and profitability**.

### **Key Metrics:**

* **Customer Satisfaction Ratings** – Based on **customer reviews, surveys, and feedback**.
* **Job Completion Time & Efficiency** – Tracking technician performance per service call.
* **Revenue & Profit Margins Per Service** – Ensuring services are profitable while remaining competitive.

### **Best Practices:**

* Set **clear, measurable performance goals** for employees.
* Provide **regular feedback and performance reviews**.
* Recognize and **reward high performers** to encourage productivity.

### **Standard Operating Procedures (SOPs)**

#### **Tracking Employee Performance Metrics**

1. Collect **weekly and monthly job reports** from HouseCall Pro.
2. Review **customer feedback and satisfaction scores**.
3. Compare actual **job completion times vs. estimated times**.
4. Provide performance reports **during quarterly reviews**.

#### **Conducting Employee Performance Reviews**

1. Schedule **quarterly or annual performance evaluations**.
2. Review **employee performance metrics** from job tracking reports.
3. Provide **constructive feedback** and set improvement goals.
4. Offer incentives or promotions to **high-performing employees**.

## 

## **13. Notes from the Author**

As the author of this HVAC Playbook, my goal has been to compile a comprehensive guide to ensure the seamless operation and success of our company. This document serves as a reference for both new and experienced employees, covering every aspect of our business operations.

### **Purpose of This Playbook**

* Provide a standardized approach to all HVAC operations.
* Ensure knowledge transfer and consistency in company practices.
* Improve efficiency, customer satisfaction, and team collaboration.

### **How to Use This Playbook**

* Refer to relevant sections for guidance on specific topics.
* Follow the best practices outlined in each section.
* Keep this document updated with new processes and improvements.

### **Final Thoughts**

I encourage all employees to utilize this playbook as a tool for success. As the HVAC industry continues to evolve, so should our practices. Your feedback and suggestions for improvement are always welcome.

Thank you for your dedication and commitment to excellence.

**Jamie Cahn  
2/18/2025**