

# Avoiding and Eliminating Callbacks



Callbacks are horrible... They kill the trade from every possible angle in ways that are hard to fully quantify or make up for. They destroy customer satisfaction, reduce technician morale by causing long hours resulting in unprofitability for companies and less earning opportunity for everyone. Possibly worse of all, callbacks tell customers that you are no better than their cousin the maintenance man or the \$35 an hour Craigslist tech. If they wanted to call someone back they could have just called them instead of a true pro.

*Callbacks make me furious!*

They have always made me furious. Back when I was a tech there was NOTHING I hated more than having a callback... Wait... I take that back, I hated being **accused of a callback** when it wasn't a callback in my mind even more.

Since those immature days of pitching a fit whenever I got a callback, I have come up with my definition of what is and isn't a callback.

### **Callbacks Are –**

- Anytime an installation or repair error is made either due to overlooking a problem or doing it incorrectly, regardless of how long ago it occurred
- When a customer calls back for a similar issue on the same piece of equipment within 30 days, even if it isn't the exact same problem
- Cases where the customer cannot be charged for the work performed due to its relationship to prior work
- Calls back out or complaints due to a failure to communicate, diagnose or repair completely

What we have learned is that the only way to reliably prevent callbacks is to come up with systems and processes that actively **PREVENT** callbacks rather than assuming that if you are a good tech they won't occur. Often we would blame the customer, the follow-up tech or faulty parts for callbacks when it was actually within our power to prevent if we were more proactive. Here is what we learned.

### **Look Around More Carefully**

Before you start diagnosis with tools look over the equipment for anything abnormal. Strange sounds, signs of abnormal condensation and oil spots can all be signs of trouble. Look for wire rub-outs, loose connection and arcing. If it looks like work was done recently, double check that the correct parts were used and that they were installed properly. If wires are a mess, electrical connections exposed, refrigerant

lines rubbing out or severe corrosion/deterioration on critical metal parts it should be addressed with the customer.

Never just fix the first problem you find and leave. If that's all you do you won't have a low callback rate and you will miss opportunities to serve the customer better. In my experience, the vast majority of systems have either initial installation/commissioning deficiencies maintenance issues, abrasion concerns or just plan faults that get missed when the tech fixes only the first and most obvious problem.

### **Diagnose More Precisely**

The proper and full diagnosis of HVAC/R equipment isn't that difficult if you are using the proper tools and techniques, but we still hear techs say "it should be fine" when looking at a charge or "That looks pretty normal" when taking an amperage reading. These aren't things that a good diagnostician guesses at, it is either within design specifications or it is in need of repair, alteration or upgrades and the customer needs to be communicated about it. KNOW the target evaporator DTD, condenser CTOA, motor RLA and system design capacity vs. delivered capacity for the piece of equipment you are working on. If you don't know what these things mean then start [HERE](#) and download the [MeasureQuick app](#) to help. Once you stop guessing you will get it right the first time more often and prevent some nasty callbacks.

### **Improve Your Workmanship**

Most bad workmanship is due to poor training, tools, supplies and real or perceived time constraints. You always have time to the work correctly or you need to FIND time to do it again. None of us get everything right, but you can work to improve your workmanship with every job you do whether it is how you make a wire connection to how to connect ducts or making a flare that never leaks. Get it right the first time and leave it looking like a pro did it instead of a handyman or a kid

fresh out of trade school.

Keep the right tools and materials on your truck to execute great workmanship and then do it a little better each time based on what you learn along the way.

### **Communicate Completely**

1. Communicate with the customer when you arrive and listen carefully to understand ALL of their concerns, not just the obvious ones and not just the ones that are easy to repair. If the customer is concerned about a high power bill, a noise, an odor or a warm room.... INVESTIGATE IT
2. Explain your diagnosis process to the customer before you begin working. Let them know that you will check the system as completely as possible and bring them results of your findings before you proceed with any repairs.
3. Once you find and note any and all issues ask them if you can show them your findings and either bring them to the points of interest if practical or show them photos on your phone or tablet. Do not use fear, negativity or drama to present the issues, be factual and to the point about the issues and prices to repair. Once the customer approves or declines each item let them know you will make the desired repairs and retest to ensure that there are no additional concerns once the system is up and running.
4. Once you are done with the work make sure to reiterate any remaining issues that they did not approve and get them to sign an invoice or document that clearly shows what was and what was not done. Once this is complete ask the customer if they are satisfied with the service and if there is anything else you can address for them before you leave. Make sure to reiterate what you left the thermostat set to and what they should or should not expect from equipment based on the repairs made. If the customer does not have a maintenance plan in place make sure that their paperwork includes a suggestion of

maintenance and that you discuss the importance of proper maintenance to the customer.

5. Fill out your paperwork fully and clearly with all work performed, and work declined and any condition issues on the equipment. Be detailed about which unit you were working along with proper model and serial numbers.

If parts are required make sure to get photos of EVERYTHING you can find, data tags, parts tags, boards, compressor model and serial etc... going back to a call just to get a model # because it was missed or written down wrong is a huge waste of time.

### **Eliminate the Careless Errors**

Walk the job before you leave and put your tools away in their proper place. This will help prevent leaving disconnects out, caps off, float switches tripped, thermometers in the duct, screwdriver on the roof etc...

Some of you are just more prone to these sorts of careless mistakes but that is not an excuse, you just need to come up with systems that prevent these forgetful errors. Here are the best ways –

- Create a checklist you go over at the end of every call that you review before you pick up your keys and put them in the ignition.
- Don't talk on the phone, text or look at social media while on a call. Create a [Do Not Disturb rule on your phone during the work day](#) so that it only rings if the person calls twice in a row. Let your loved ones, manager and dispatch know that they will need to call twice to get you if it is urgent.
- Force yourself to put tools and parts in the same place every time so that you can tell very quickly if you left or forgot anything.
- Never leave in a rush. Finishing a call is never as

simple as hopping in the van and peeling out. Follow a process and think through the job before you pull away. Don't be in a hurry to "get away before the customer walks out and asks another question", that sort of thing will get you in big trouble.

## **Gut Check**

The final test is a gut check. If your gut tells you the diagnosis isn't right, you didn't make the repair right or the customer isn't 100% understanding what's going on then please **DON'T LEAVE.**

I know it can be tempting especially after a long day or an especially difficult call or customer but trust me, leaving never makes it better. Hang in there, read up on the system, perform more tests, check the ducts again whatever you need to do but don't bail.

Sometimes you will have a customer that you just know is going to turn around and call back. You can tell they aren't listening to you about your findings or they have a misunderstanding about the system operation. These are the ones you want to **MAKE SURE** you get your recommendations in writing, clearly spelled out with a signature.

If you really want to ensure it doesn't come back, spend 15 extra minutes and write them a nice, positive email and copy your dispatcher and your service manager with a description of what you found, what you recommended, what you repaired, any system condition issues and how they should expect the system to operate with photos attached. It will really reduce those immediate callbacks from difficult customers.

# **1. Observe the entire system**

2. **Diagnose all the issues**
3. **Test the system fully**
4. **Communicate through the entire process**
5. **Follow a process to ensure you don't miss anything silly**

– Bryan