



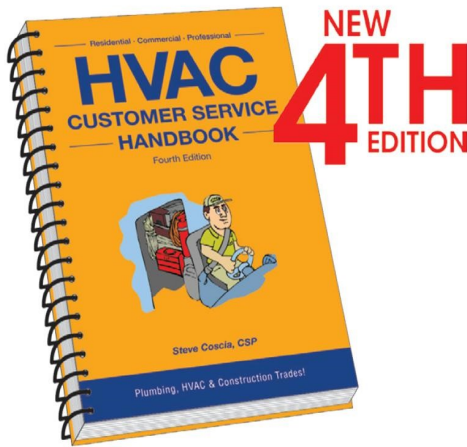
HVACR Soft Skill Training Resources

Presented By:
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A Partial List of Educational Institutions

**Taught at
more than
200 Colleges**



- Academy Of Building Industries, AZ
 ACCA - National Capital Chapter, MD
 ACCA - Western PA Chapter, PA
 Allegheny College Maryland, MD
 Arizona Vocational Training, AZ
 Arrowhead Inc., WY
 Blue Ridge Community College, NC
 Bowling Green Tech College, KY
 Brownson Technical School, CA
 Career Ctr Northern Nevada, NV
 Central Piedmont Comm. College, NC
 Chippewa Valley Technical College, WI
 College of Albemarle, NC
 College of Allegheny County, PA
 College of Lake County, IL
 College of Southern Maryland, MD
 College of Southern Nevada, NV
 Corinthian Colleges, Inc., CA
 C-TEC, OH
 CustomVac, MB
 Cypress College, CA
 East Central College, MO
 El Camino College, CA
 Elgin Community College, IL
 Environmental Technical Inst., IL
 Fortis College, UT
 Fort Myer Institute of Technology, FL
 GBG Inc., PA
 Global Institute of Technology, IL
 Granite State Trade School, NH
 Greenville Technical College, SC
 Guilford Tech Community College, NC
 Hawkeye Community College, IA
 HVAC Business & Technical Institute, WA
 Institute of Technology, CA
 Institute of Technology, CA
 Intellitec Colleges, CO
 Ivy Tech Community College, IN
 J.M. Tawes Technical Center, MD
 John Tyler Community College, VA
 UA JATC Local 103 - Casper Area, WY
 UA JATC Local 353, IL
 UA JATC Local 597 - Chicago, IL
 UA JATC Local No 10, MN
 UA JATC Local No 11, MN
 UA JATC Local 32, Seattle, WA
 UA JATC Pipefitters Local 142, TX
 UA JATC Pipefitters Local 211, TX
 UA JATC Local 290, Tualatin, OR
 UA JATC Pipefitters Local 137, IL
 UA JATC Pipefitters Local 344, OK
 UA JATC Pipefitters Local 455, MN
 Jefferson College, MO
 Jefferson Technical College, KY
 Johnson Controls, NV
 Kankakee Community College, IL
 Kennedy King College, IL
 Laramie County Comm. College, WY
 Laramie County Community College, WY
 Lincoln College of Technology, MD
 Lorain County JVS, OH
 Maine Energy Marketers, ME
 Martin Community College, NC
 Mechanical Trades Institute, GA
 Midlands Technical College, SC
 Midwest Technical Institute, IL
 Mitchell Tech, SD
 Mott Community College, MI
 Nance International, TX
 North Montco Tech Career Center, PA
 North VA Community College, VA
 Northwest Louisiana Tech College, LA
 Ohio Hi-Point Career Center, OH
 Peralta Community College, CA
 Piedmont Technical College, SC
 Pikes Peak Comm College, CO
 Pipefitting Training Center, WA
 Piping Industry Training Center, OH
 Pittsburgh Technical Institute, PA
 Prime Group, AZ
 Redstone College, CO
 Remington College, Memphis, TN
 Richmond Technical Center, VA
 Sacramento Sheet Metal Workers, CA
 So. Shore Regional School, MA
 Southeast community college, NE
 Surry Community College, NC
 Technical College of Lowcountry, SC
 Tri County Technical College, SC
 Triangle Tech, PA
 Tulsa Technology Center, OK
 UDR, Inc., TX
 Universal Appliance Repairs, NY
 Washtenaw Community College, MI
 Wichita Technical Institute, KS
 YTI Career Institute, PA



With students and faculty at
North Virginia Community College.



With students and faculty at
Tulsa Tech.

What are Soft Skills?

- ◆ Teamwork (with coworkers)
- ◆ Personal accountability (do what you say you'll do)
- ◆ Honesty and integrity (tell the truth)
- ◆ Reliability and dependability (mandatory requirement)
- ◆ Communication skills (3 types: verbal, non-verbal & professional)
- ◆ Mutual benefit suggestion (good for customers and your employer)
- ◆ Coworker coverage (don't throw coworkers under the bus)
- ◆ Personal hygiene (look and smell neat)
- ◆ Problem solving (remain calm so rational thinking prevails)
- ◆ Cleaning up afterwards (never leave a mess)
- ◆ Critical thinking (gather the facts – listen first)
- ◆ Minimize blame implication (contain adverse events)
- ◆ Restraint, not retaliation (anger will punish you)
- ◆ Listening (requires mental energy)
- ◆ First Impression (maximize this always)
- ◆ Penmanship (neatness and handwriting)
- ◆ Spelling (subset of professionalism)
- ◆ Preparation (haste makes waste)
- ◆ Not procrastinating (do it today, not tomorrow)
- ◆ Positive thinking (expect things to go well)
- ◆ Telephone skills (smile and adjust pace of speech)
- ◆ Paperwork completion (do it right the first time)
- ◆ Timing (knowing when to speak and when to listen)
- ◆ Organization (less clutter translates into more efficiency)
- ◆ Smile often (you'll feel better)

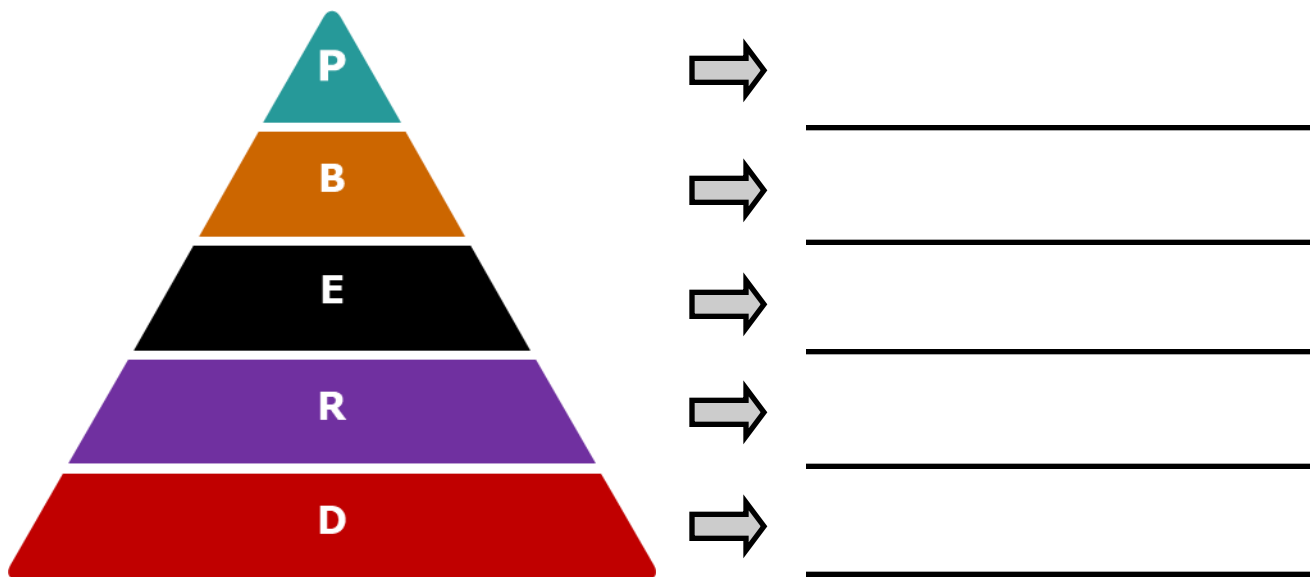
Student Engagement

If you want them to _____ it, _____ talk.

If you want them to _____ it, _____ talk.

ACROSTICS **STORIES** **RULE OF 10**
PROPS **PAIR SHARE** **DELEGATE**
Flip Charts **VIDEO**

Why Stories Work



Soft Skills and Talking Too Much

Editorializing Behaviors

Maximize these...

Minimize these...

- | | | | | |
|---------------|---|---------|---|------------------|
| 1. Humility | ← | antonym | → | 1. Conceit |
| 2. Empathy | ← | antonym | → | 2. Self-Interest |
| 3. Discretion | ← | antonym | → | 3. Showiness |



My Notes... _____

Creating a Signature Story

Methodology: Answer the following questions in two ways: (1) Be brutally honest and (2) write the first ideas that come into your head right away. Use the section on the left to brainstorm notes and ideas. As you refine your story ideas, publish them below.

1) What is a personal experience you will never forget?

2) What is the lesson learned?

3) Can that lesson learned tie into a presentation? How?

4) What business lesson will you share with employees?

Residual

Feel:

Understand:

Do:

Remember:

Signature Story Summary


Story Title: _____

Story Theme: _____

Lesson Learned: _____

First Impressions

Greetings



- Smile and make eye contact
- Practice good personal hygiene
- Wear clean, company-issue attire
- Bring shoe covers and wear them
- Say "Thank you"
- Have a pen and flashlight handy
- Keep the truck neat and orderly

The first _____, can also be the customer's final _____.

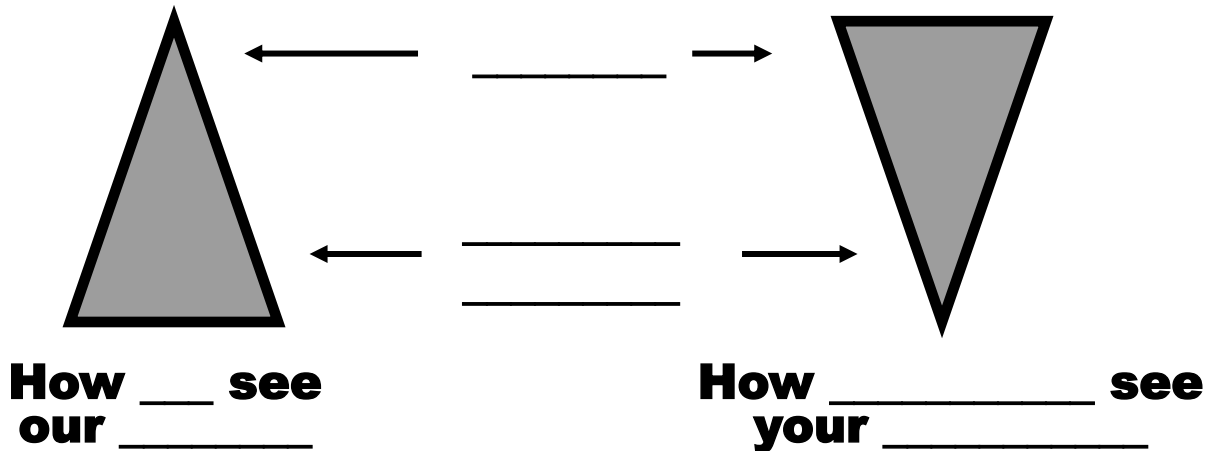
Customers do not gather _____ to make a decision; they often gather it to _____ their _____.

Honesty and Integrity

It's better to disappoint a customer with the truth than to satisfy a customer with a lie.

My Notes... _____

How Customers See Things!



Word Substitution for Technicians

Don't Say This

- No problem.
- Can I help you with that?
- You blocked my furnace access.
- You're confusing me.
- If you want my help, then you'll have to...
- That's our policy...
- We can't do that...

Say This

My Notes...

Fix the Thermostat, not the Customer

Student Worksheet

Instructions:

1. Read the italicized story on page 20 of the HVAC Customer Service Handbook.
2. Read the story a second time and look for positive or negative behavioral choices made by the characters in the story.
3. In the spaces below, write examples of behavioral choices, write whether each choice is positive or negative, and explain your answers.

<i>Behavioral Choice</i>	Positive or Negative?	<i>Explain your answer</i>

Instructions:

Write your answers to the following questions in the space provided below each question.

How did the HVAC representative keep the situation from getting worse?

How did the HVAC representative demonstrate he understood Jim's frustration?

How did the HVAC representative demonstrate he respected the way Jim saw the problem?

Congruency & Customer Service!

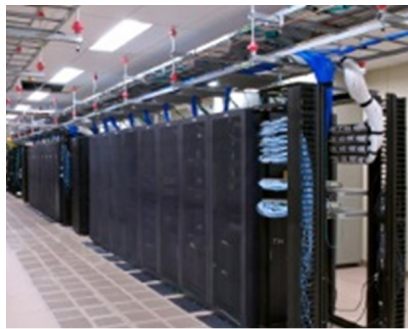
What a Customer sees from their Window Matters!



H _ _ _ _

E _ _ _ _ _

Standard Operating Procedure (SOP)



My Notes... _____

Integrity is doing the _____ thing, even when no one is _____.

Trust is gained and honesty is _____ with customer _____.

Be on time. _____ late says that your own time is more _____ than the time of those who waited for you.

Honesty

Anyone who doesn't take _____ seriously in small matters cannot be _____ in big matters.

It's better to _____ a customer with the truth, than to _____ a customer with a lie.

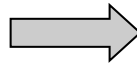
Being _____ means doing what you said you would do.

What Does “Proactive” Mean?

Leveraging _____ - _____ to _____ something to happen rather than _____ after something happens.

Cause

Sloppy attire, know-it-all attitude and feel entitled. }



Effect

{ Diminished chance of being hired.

Customer declines scheduled equipment maintenance. }



{ Equipment failure, emergency service call, unexpected expense & an unhappy customer.

People invite the type of behavior that they convey towards others.

Life’s Two Success Skills

- 1.Preparedness**
- 2.Perseverance**

These two words convey a proactive attitude of staying with a problem until it is resolved.

My Notes... _____

Attitude of Today's Customer



Today's Convenience Oriented Customers

Today's convenience-oriented customers want the _____ to buy time, a transaction increasingly seen as the ultimate _____ purchase.

The ease of _____ availability has resulted in a shift of customer attitudes from _____ products and services to valuing time.

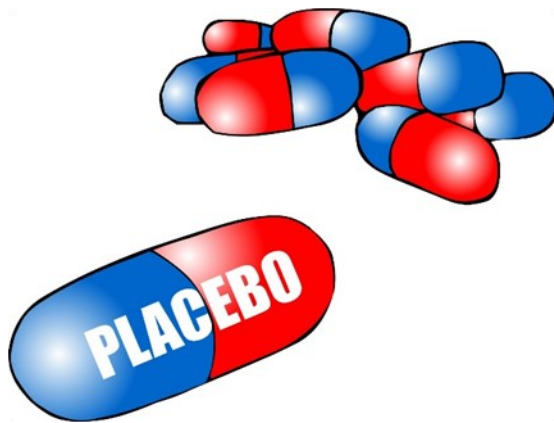
What Customers Hear

A _____

F _____

S _____

D _____



No Placebos!

Impact of our Smartphones

Cognitive Capture

When a person focuses mental energy on one issue, it can cause that person to miss out on other things.

What are Cognitive Skills?

Brain-based skills that perform simple to complex daily activities.

Complete Data Capture



Put quality in and you'll get quality out
Put garbage in and you'll get garbage out

- Be complete and thorough
- Consider your office coworkers' information needs
- Enter correct data to save time and maximize efficiency
- Pay attention to details

Information Is Power


- ◆ The person with the best notes.... wins.
- ◆ Capture key points about each service call.
- ◆ When customers decline a service, note that the customer declined your recommendation (write the date and time).
- ◆ A few seconds of data capture now will save hours of time and hundreds of dollars later.

My Notes... _____

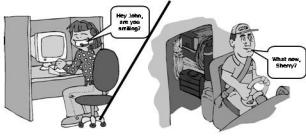
PowerPoint Slides

Chapter 1
Practical HVAC Service ideas


1



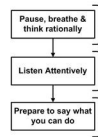
Split Second Response
Teamwork & Remaining Calm




3



The Split Second Response




4




Flexibility & Personal Accountability

All employees depend on each other to go the extra mile in helping customers.



Question: What does this image say to you?


5



Personal Accountability

- Teamwork requires flexibility among all the team players
- HVAC reps own and take responsibility for their words and actions
- A responsible HVAC rep should ask for help
- The best team players place their customer's needs ahead of their own
- Being accountable is good teamwork and it helps in problem resolution

6




Fix the Thermostat, Not the Customer

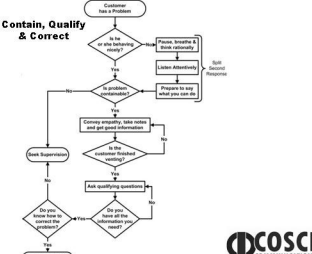
- Bad customer behavior is a symptom, not a problem (root cause)
- You can't fix a customer
- Focus on fixing a problem's root cause, not the customer's behavior
- When you fix the root cause, then a customer's behavior will improve

Question: What does "you can't fix a customer" really mean?


7



Contain, Qualify & Correct




8



Qualify the Details

- Quality an order for a vent or grille
 - Example: Do you need a supply register (damper) or a return grille (no damper)?
- Quality similar sounding consonants over the phone
 - An "S" sounds like an "F"
 - An "M" sounds like an "N"
- To qualify, remember four W words:
 - Who, What, Where and When – these result in complete information

9




Attitude, Aptitude and the Dreaded Morning Call

- A positive attitude improves a person's aptitude (ability)
- A negative attitude diminishes a person's aptitude
- A dreaded morning call can run a whole day if your attitude suffers
- Practice the split second response to avert a bad attitude

Question: How does the split second response affect a person's attitude?

10



These Calls Will Happen

My house is cold, my kids are freezing and I am furious!

A professional must be prepared for anything!



11




The Attitude of Empathy

- Diagnostics and troubleshooting are important skills
- Most HVAC reps have technical expertise in abundance
- Technical skills alone comprise only half of what is required to satisfy customers
- The other half is empathy
- Empathy allows people to listen more and care about those who need help


Question: How can empathy improve teamwork among coworkers?

12



The First Impression


Keep the truck clean.




What a customer sees from their window may convey lots of detail, both positive or negative.

Investing a few minutes tidying up the truck's dashboard makes a more positive first impression.

13




Greetings In Person




- Smile and make eye contact
- Practice good personal hygiene
- Wear clean, company-issue attire
- Bring shoe covers and wear them
- Say "Thank You"
- Have a pen and flashlight handy
- Keep the truck neat and orderly

14




Teamwork and Editorializing

- New hires are often paired with a mentor
- A mentor is someone who teaches or helps a less experienced person
- Teamwork is important among these paired relationships
- More experienced employees should consider a new hire's feelings
- It's best to be constructive when communicating and not editorialize

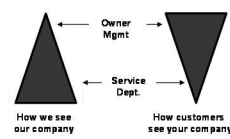


Question: What should Joe have done?


15




Attitude and Your Company's Image




16




When Too Much Talk Makes Things Worse (editorializing)



Customer hear what they want to hear.



18




When Too Much Talk Makes Things Worse (editorializing)

- Editorializing occurs when you say more than you should
- Learning to NOT editorialize is an HVAC rep's personal responsibility
- HVAC reps should be careful about saying too much
- Too much information can confuse customers and make things worse
- Customers won't hear what is not spoken – say less and listen more

Question: What are other editorializing examples?

19




The Truth in HVAC Service

- Relationships work best when customers and HVAC reps are honest
- Problems are more difficult to resolve without the truth
- If being honest requires more work, then do it
- Honest is always the best policy when serving customers
- It's better to disappoint a customer with the truth than to satisfy a customer with a lie

Question: How does dishonesty affect customer relationships?


20




PowerPoint Slides

The Service Placebo - Don't Do It

- A placebo is neutral remedy prescribed for psychological effect
- A placebo has no potency
- A placebo doesn't fix the root cause
- Customer service must be both potent and effective
- Follow up to differentiate your company's service




Question: What are examples of potent service?

21 


Verbose Customers

(they talk too much)




When handling a verbose customer use the correct tone and words.


In most cases, simply saying, "I know you're busy, so I'll let you go" is an effective way to close a verbose customer.

22 

Restraint not Retaliation



Each service call is like a drop of water in a bucket. It's best to remain calm. Otherwise, after enough drips you may get a call that will push your button and ... Splash!

23 

Restraint not Retaliation



There is no place for anger in customer service.

Using restraint, rather than retaliation will contain situations, resolve real problems, and preserve long term business relationships.


24 

The Three F Empathy Method

Definition of Empathy: "I know how you feel."

The Three F Method - Feel, Felt & Found

- I know how you **feel**.
- Others have **felt** the same way.
- And they **found** that investing in a preventive maintenance contract saved money in the long term.

25 

Customer Service Phone Calls



If you don't feel like smiling, then fake it.


An insincere smile is better than a sincere frown.


Customers will hear a smile over the phone.

27 

Opening and Closing Phone Calls

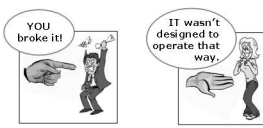
- Proper Greeting**
 - Both verbal and non-verbal professionalism
- Opening Phone Calls**
 - Move to a quiet environment prior to answering a cell phone.
 - Greet and identify yourself
- Closing Phone Calls**
 - Practice mutual closure
 - Follow up if necessary




28 

Using "I" or "It" Instead of "You"

The word "you" can imply blame and exacerbate a situation



29 


Say what you CAN do rather than what you CAN'T do

Rephrase your responses so that you appear more cooperative


Example:


Incorrect: Sorry, we can't get there this morning.

Correct: We can arrive this afternoon.

30 

Accentuating the Positive



31 


Errors, Absolute Extremes & Imperatives

Avoid using absolute extreme phrases when you serve customers. Absolute extremes are words such as: **every, all, always and never.**

Example:

Incorrect: He's **never** at his desk.

Correct: He **stepped away** from his desk. **May** I have him return your call?

32 

Imperatives (command)

An **IMPERATIVE** is a command which makes a person sound inflexible.

Example:


Incorrect: Listen! You won't find a better thermostat anywhere.

Correct: If you give this thermostat a chance, you'll agree it's the best.

33 

Don't Rush Customers Off the Phone

- Be patient**
 - Let customers vent, if they need to.
- Listen actively**
 - Say "I understand." or "I see."
- Convey empathy**
 - Say "I know how you feel."
- Qualify the details**
 - Use the four W words: Who, What, Where and When

34 


Words vs. Tone of Voice

(over the phone)

Tone of Voice = 80%

Words = 20%

Over the phone, **80%** of what a customer hears is your tone. Words comprise only **20%**.

35 

Conveying Finesse When Saying No

Three key behaviors when the answer is no:

(1) Knowing **when** to say "No"


(2) Knowing **why** to say "No"

(3) Knowing **how** to say "No."


Example:

Incorrect: Sorry, we **can't** get there this morning.

Correct: We **can** arrive this afternoon.


36 

Tablet Usage



- Put quality in and you'll get quality out
- Put garbage in and you'll get garbage out

- Pay attention to details
- Be complete and thorough
- Consider your office coworkers' information needs
- Enter correct data to save time and maximize efficiency

37 

Voice Mail: Garbage-In, Garbage Out

- Voice mail is an input/output device
- The more quality you put in, the more quality you get out or the more garbage you put in, the more garbage you get out (GI GO).
- Customers won't call you back if they can't understand your voice mail message
- Speak slowly, be concise and say your phone number twice

38 

Contact Steve Coscia with any questions about this lesson:

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39 

The Mechanical Trades, Education and Millennials

by Steve Coscia, CSP

The plumbing and heating mechanical trades rely on young trade school graduates to fill the positions vacated by their older counterparts. As senior technicians retire, younger ones are expected to fill the void.

Unfortunately there's a shortage of young mechanical workers. The market for technicians and installers will grow 34% through the year 2020 according to the U.S Department of Labor.

"The building trades (including HVAC) currently have about 1.2 M job openings that require a technical skill set." says Howard Weiss, HVAC Excellence Marketing Director. "Unfortunately, parents and school guidance counselors don't seem to realize that the old blue collar model is gone. Today's technical worker can have a bright career providing he or she learns advanced math skills along with critical thinking and diagnostic disciplines."

This current shortage of workers is a supply/demand issue. There is a diminished supply of workers amidst the industry's continual high demand. This problem, however, goes much deeper than the quantity of workers; there's a quality issue too. And it is serious.

So where are the good technicians? They are in your midst and in your town.

"Servicemen can make terrific employees," says Gary Burch from Gene Burch Plumbing and Heating in Novato, CA. "We hired an ex-Coast Guard Millennial who has all the right behaviors - he is structured, on time and polite. He's been with us about six months and has already installed a few furnaces."

When asked how he found his recent employee, Burch answered, "A help wanted ad." No secret there. Consistent and aggressive advertising still works in getting the word out and attracting potential employees.

The innovative plumbing and heating company owners who I serve are still able to attract the best technicians. How? By raising the service bar within their company and becoming their regions best contractor. Given a choice, technicians prefer to work with the best company in town rather than another commoditized service company.

There is prestige in wearing the uniform of the best company in town. Labels and brands matter. And people would rather be associated with the upper-tier brand.

Being the employer of choice in your marketplace yields benefits beyond hiring the best and brightest. Setting high service expectations and enforcing them is what enables the best contractors to dominate their market. PHCC's education opportunities boost a contractor's service level with exceptional operations and management seminars.

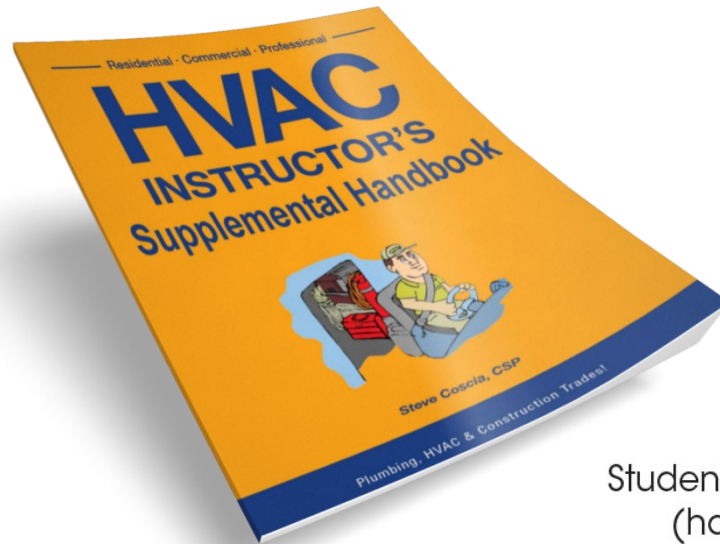
PHCC members learn best practices that help companies to establish competitive pay & benefits, ongoing training, a culture of teamwork and the latest industry trends. And there's no substitute for the camaraderie and sharing during PHCC chapter meetings.

I have witnessed a growth-by-acquisition trend among contractors. And I suspect this trend is a manifestation of what happens when one company dominates a market. The key factor, in my opinion, that enables outstanding companies to acquire their competition, is their employees. They hire the best.

PHCC members also are urged to serve their local high schools, by speaking about the trades, and specifically, ask guidance counselors to consider that not every high school graduate is a four year university candidate.

Originally published in PHCC California Connection

Instructor's Supplemental Handbook



Learning Outcomes

Student Worksheet
(handout)

Student Reading Assignment and Worksheet Instructions

Discussion Questions

Teamwork and Editorializing

Learning Outcomes
The student should be able to:

- Support co-workers and customers when they make mistakes.
- Recognize that everyone in the company is hurt when he/she makes fun of others' mistakes
- Make positive behavior towards co-workers and customers

Using the Student Worksheet
Give each student a copy of the Student Worksheet on the next page.

Direct students to read pages 38 and 39 of the HVAC Customer Service Handbook twice, the first time for comprehension, the second time for behavioral observations.

Direct students to complete the behavioral matrix on the next page.

Direct students to complete the questions on the next page.

Lead a discussion using the discussion questions below.

Instructor Discussion Questions

- Have you seen new hires teased in the workplace?
- How does your company react to employees who embarrass other employees?
- Has anyone in your company taken a stand against co-workers' embarrassing each other?

Teamwork and Editorializing

Student Worksheet

Instructions:

- Read the italicized story on pages 38 and 39 of the HVAC Customer Service Handbook.
- Read the story a second time and look for positive or negative behavioral choices made by the characters in the story.
- In the spaces below, write examples of the behavioral choices, write whether each choice is positive or negative, and explain your answers.

Behavioral Choice	Positive or Negative?	Explain your answer

Instructions:
Write your answers to the following questions in the space provided below each question.

How did Joe tell to support Zach?

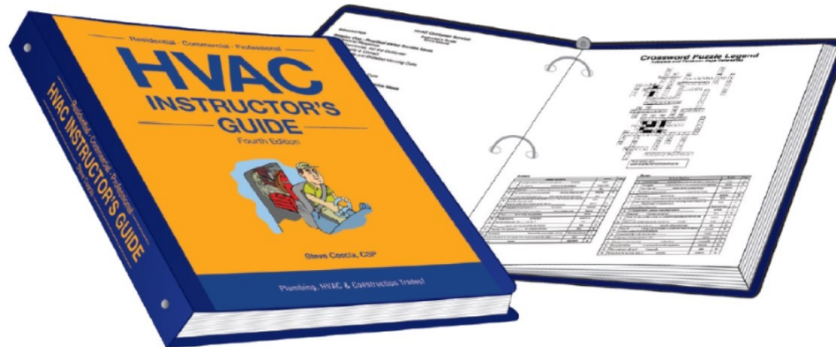
How did the boss show empathy towards both Zach and Joe?

What could be the long-term impact of Joe's behavior toward Zach?

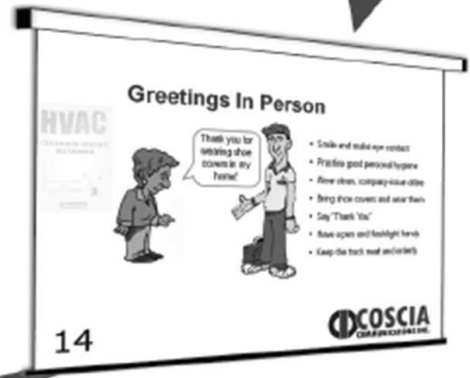
Textbook for reading assignments, reference, and workbook.



Instructor's Guide with lesson plan, course objectives, exam legend, student preparation, crossword legend and instructor's video.



DVD reinforces the soft skills behaviors with real time scenarios.



PowerPoint (36 Slides) correlate to the textbook in sequential order.

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