PROCESS WRITING KIT INSTRUCTIONS

As you build freedom in your business, here is a Process Writing Kit that may help to simplify your writing process.

A) Get a clipboard. Place this clipboard in a convenient location – such as on your desk or in your truck – wherever you are most likely to be when team members ask you questions.

B) Anytime a team member asks you a question, that you did not need to be the one answering…
   ➤ Grab your clipboard, go with them right then and there, and write a process to answer the question.

C) Anytime something in your business bugs you…
   ➤ Grab your clipboard and write a process to solve your pain.

4 Keys to Remember:

Write Your Process
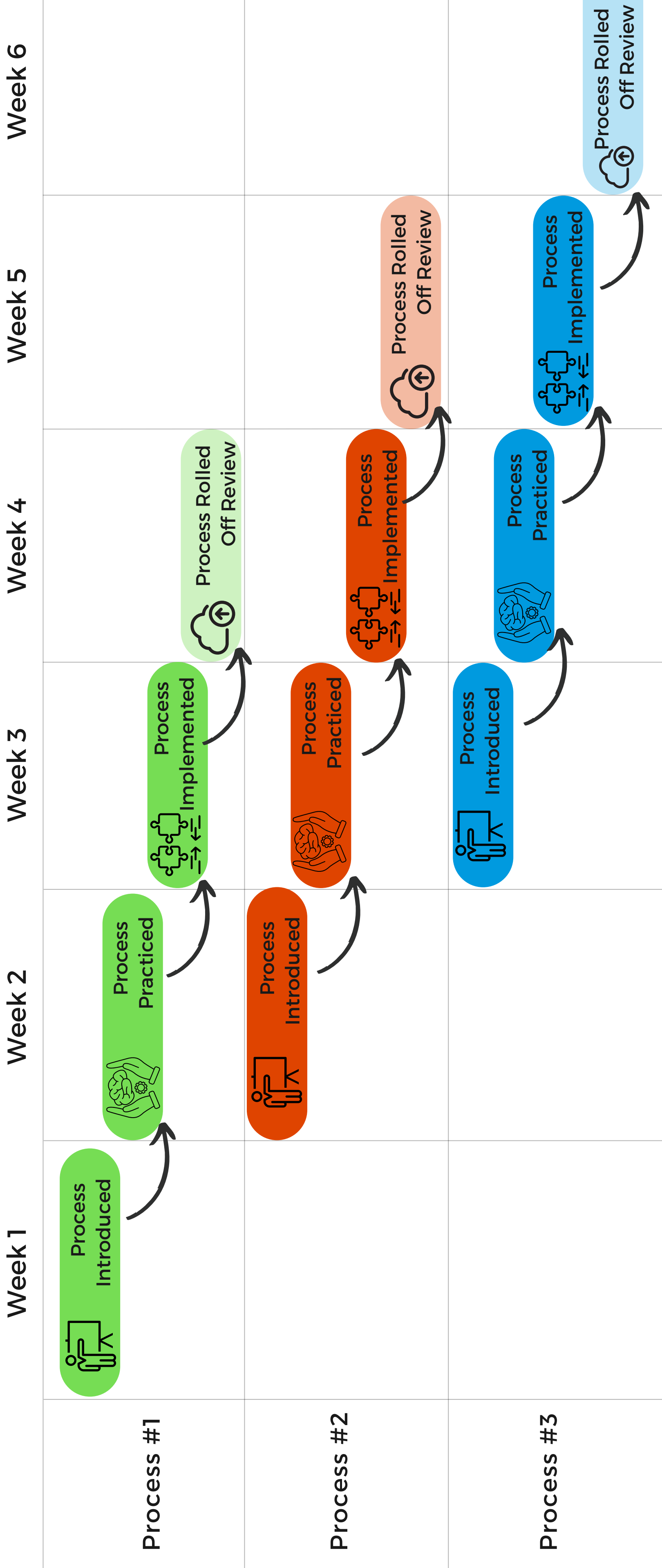
Test Your Process

Tweak Your Process

Implement Your Process

*TIP from Matt Koop: Processes change over time and people change over time – write your processes based on position and titles instead of team member names to help with scalability.

Need help? Call anytime: 706-259-8892

Process Implementation Roadmap

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Process #1	Process Introduced	Process Practiced	Process Implemented	Process Rolled Off Review		
Process #2		Process Introduced	Process Practiced	Process Implemented	Process Rolled Off Review	
Process #3			Process Introduced	Process Practiced	Process Implemented	Process Rolled Off Review

Process Title:

Process Description:

Process Steps:

Desired Outcome:

THE NEW FLAT RATE

Process Title: <mark>Interview Process</mark>

Process Description:

This document provides simple steps to follow while hiring a new tech.

Process Steps:

Introduction

ALWAYS interview each candidate three times and a minimum of three candidates - why?

Because we don't want to make emotional decisions.

 Steps:

1. **Phone Call:** (no need to pre-schedule; simply call the applicant at random and see if you mesh on the phone; ask for them to tell you a little about themselves including basic work experience).

   - If you are interested, invite them onsite for a live interview.

2. **1st Onsite Visit:** Ask your interview questions, review their resume, have them do a hands-on test at the shop if applicable to see if they are as mechanically inclined as they say they are. (No promises are made at this interview; you simply let them know they will hear from you with any next steps).

   - If you are still interested, invite them back for the final interview.

3. **2nd Onsite Visit:** In this interview, you confirm with your gut whether or not this is a candidate that would fit in well with your team culture. Have them sing "Twinkle, Twinkle, Little Star" to make sure they can follow basic instructions. If so, then make them an offer and negotiate their start on a 90-day probationary period with your company.

Desired Outcome:

To make hiring new team members as simple as possible and to hire the right fit for your team.

Process Title: <mark>New Employee Onboarding Process</mark>

Process Description:

This document describes steps and procedures to follow when a new employee joins the company.

Process Steps:

Pre-Onboarding
1. The position of the new member must be determined.
2. Department of the new member must be determined.
3. Workspace of the new member must be determined.
4. Business/workforce management system logins must be created and tested for the new member.
5. Computers, iPads, and all materials needed for the position must be determined and provided.
6. IDs and logins for all devices must be created and tested.

Onboarding
1. New member must be introduced to his/her supervisor/manager.
2. Supervisor/manager must provide required job trainings including:
   - Introduction to the team members and departments
   - Providing the needed devices and materials for the job
   - Training and introduction to the company's culture, ethics and values, using the employee handbook, and other company resources
   - Training on how to use the company's business/workforce management systems

Post-Onboarding
1. New employee must show competence and willingness to learn during a 90-day probationary period.
2. Supervisor/manager must continue to provide support to the new member for the duration of his/her probationary period.
3. Supervisor/manager must monitor the performances of the new employee to ensure that it aligns with the expected standards.
4. Supervisor/manager must provide support in areas that the new member lacks proficiency.
5. After the 90-day probationary period expires, supervisor/manager must determine if the new employee is a great fit for the company.

Desired Outcome:

To ensure an onboarding process that sets the new employees up for success, and helps the company determine if the new employee is a great fit for the company.

THE NEW
FLAT RATE

Thursday – July 30, 2020

8am – 9am New hire paperwork / review and sign employee handbook / sign media release

9am – 9:30am Login / email access with **Admin**

9:30am – 12:30pm Training with **CSR**

- Customer Service procedures

12:30pm – 1:30pm LUNCH

1:30pm - 2:30pm Setup Devices / Technology

- TNFR App
- Dispatch Software
- Company phone

2:30pm – 5pm Watch training videos in TNFR Training Lab and take notes

Friday – July 31, 2020

8am – 8:30am Team meeting (in lobby)

8:30 – 10am Dispatch training with **Dispatcher**

- Updating customer info
- Determining daily schedule
- How to enter orders
- How to create invoices

10am – 11am Job Overview with **Service Manager**

- Job requirements and responsibilities
- Incentive program defined
- Ride-Along expectations
- TNFR Demand Script Presentation practice

11am-12pm Accounting processes with **Accounting**

- How to submit invoices
- How to submit Work Orders

THE NEW FLAT RATE

Process Title: <mark>Onboarding/Training Process for New Service Technician</mark>

Process Description:

This process is to streamline the onboarding of new service technicians into company culture and the implementation the TNFR system so they can start generating revenue for the company.

Process Steps:

First two weeks walkthrough

- Before starting the position, service technician must pass drug test and background test as required and outlined in the employee handbook.
- First day will be on the morning of the company's weekly service meeting where they will be introduced to all staff.
  - First day will consist of all paperwork and office prep work along with sizing for uniforms and issuing of company owned resources such as electronics, clip boards, TNFR Script book, and paperwork review training.
  - Balance of first week will include riding in the field as a helper/observer with field lead service technician to get a feel of all company processes and procedures that will affect the service department.
- **Week 2**
  - Every morning will begin with 2 hours in the training room
    - 1 hour of training video review
    - 30 minutes of writing presentation script
    - 15 minutes mimic role play with manager
    - 15 minutes customer-technician role play while being recorded on video (video will be on phone and texted to technician after session for review)
  - After script training, field lead will pick up for ride a-longs.
    - Wednesday-Friday ride a-longs will include trainee service technician presenting to customers with field lead on first call and debriefing and reviewing presentations afterward.
      - Field lead will set audio recorder in pocket for each presentation for review.
- **Week 3**
  - After successfully passing first two weeks and memorizing the Demand Service script 100%, then service trainee will be scheduled to attend either Virtual or Live TNFR Full Implementation training class.
  - Also, given that trainee passed all technical and communication tests given by field lead, then they will be issued service vehicle to begin running basic calls daily as available.
  - As long as service technician is hitting introductory targets and keeping call backs below 5%, then they will be introduced to mainstream leads and higher-end training schedules moving forward.
    - See process for incentive qualifications after 90 days.

Desired Outcome:

For service technicians to be properly onboarded within a two-week period and be able to bring in consistent revenue for the company.

THE NEW FLAT RATE

Process Title: <mark>Service Technician Hiring Process</mark>

Process Description:

This document describes the steps to follow when hiring a new Service Technician.

Process Steps:

1. Draft and finalize job ad
   - Determine the Directly Responsible Persons (DRP) for the project
   - Determine the timeline for the project
2. Job Ad Placement
   - Determine the Directly Responsible Persons (DRP) for the project
     - Determine who is responsible for ad placements, follow-ups, and conducting interviews
   - Determine the medium/media to utilize
     - Radio
     - Television
     - Referrals
     - Company website
     - Job placement websites
   - Determine the job placement websites to use
     - Indeed
     - Craigslist
     - Facebook
     - Monster
     - LinkedIn
3. Interviewing the candidates
   - Phone Interview
   - First Onsite Interview
   - Second Onsite Interview
4. Onboarding Successful Candidates
   - Plan out the first 2 weeks of the onboarding process
   - Determine and assign mentors
   - Determine the incentive package for mentors
   - Schedule and plan the 30, 60, and 90-day reviews for the candidates
   - Determine and schedule all required training
   - Determine when benefits enrollment takes effect

Desired Outcome:

To ensure the hiring of capable service technicians who will fit best into the company's culture.

THE NEW FLAT RATE

Process Title: <mark>Service Tech Onboarding Checklist/Roadmap</mark>

Process Description:

This process is to help streamline the onboarding process of new service techs to the company culture by offering clear expectations and guidelines for employment during the first 90 days from their hiring date.

Process Steps:

- ☐ Pre-employment
  - o Before starting position, tech must pass drug and background tests as required in employee handbook.
- ☐ First day
  - o Completion of all paperwork and sizing for uniforms.
    - Federally required forms: W4 - Tax Withholding and I9 – Right to Work
    - Issue and sign company handbook
    - Additional company New Hire documents – Direct Deposit, etc.
    - Present proof of education and any active professional certifications
    - Issue company owned resources, when applicable
  - o Company personnel introductions
  - o Facility tour
  - o Timekeeping instructions

- ☐ Weeks One to Three
  - o Will include:
    - Issue daily training schedule for the first one-two weeks of employment.
    - Assign incentivized mentor who will guide the new employee through their first 90 days.
    - Outline performance goals for first 90 days.
      - o Training goals
      - o Job functions/competencies (should be consistent with and listed in job ad)
      - o Revenue expectations, incentive plans defined, if applicable
    - Schedule 30, 60, and 90-day employee review sessions.
    - Attend a live or virtual TNFR training event in Dalton during first 30 days.
    - Practice TNFR Demand service script daily:
      - o Mimic and roleplay with other techs/Service Manager
      - o Study Home Warranty and Selling Service Agreement sessions and scripts
      - o Review TNFR training video in the app

- ☐ 90-day goal
  - o Continue practicing scripts daily (all TNFR Scripts)
  - o Successful completion of 90-day performance review
  - o Enroll employee into company benefit programs (if applicable, based on policy)
  - o Set new performance goals and revenue-based incentives

Desired Outcome:

To ensure that new service techs are properly equipped to perform their job functions and are exposed to all that is required to make them successful in the company during their first 90 days.

THE NEW FLAT RATE

Process Title: <mark>Technician Ads Placement Template</mark>

Process Description:

This document is a template to be used when creating a job placement ad for Service Technicians.

Process Steps:

<div align="center">

We Are Hiring!!!

</div>

Perks:

✓ No Selling Required   ✓ Optional   ✓ License Bonuses

Benefits and Incentives include:

- Medical Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- Long Term Disability Insurance
- Gas Benefits
- 401K
- Overtime Opportunities
- Paid Time Off*
- Performance based bonuses and commissions
- Competitive base pay

Desired applicants must:

- Have a great attitude
- Have an open mind, and willingness to learn, unlearn, and relearn
- Have a sense of responsibility, and be a self-starter, who is motivated to

Job Description:

Successful applicants will be expected to:

- Work eight to ten hours a day for five days per week, and be available for on-call weekend work
- Attend early and/or late weekday meetings with customers, vendors, and staff personnel as needed
- Pursue, develop, and participate in continuing education
- Have script-infused conversations with customers
- Meet and exceed shop minimums
- Sit, stand, walk, and bend for prolonged periods of time while being productive
- To lift up to 100 pounds of equipment and job parts
- Know and abide by the local HVAC codes
- Work with inspectors, suppliers, and co-workers to ensure correct project work

Desired Outcome:

To ensure the hiring of capable service technicians who will fit best into the company's culture.

Here's the whole outline!

Process Title: _____ _____
Department in Company   Task Name   Process

Process Description: This process describes the steps to _____ _____
Action Verb   the/a(n)/to   Noun

Process Steps:

1. _____ the/a(n) _____
   Command   Noun

2. _____ the/a(n) _____
   Command   Noun

3. _____ the/a(n) _____
   Command   Noun

Desired Outcome: _____
A wish you'd make on a shooting star

The 20 Second Process