



Position Agreement For: HVAC Installation Technician

Position Title:
HVAC Installation Technician

Managers Position:
HVAC Field Operations Manager

RESULT STATEMENT: I AM ACCOUNTABLE FOR PRODUCING THE FOLLOWING RESULTS: To educate customers and provide innovative solutions and repair service to achieve revenue, lead generation, profit and customer service goals.

Tactical Work

- Be an enthusiastic team player willing to help others and the team.
- Perform and properly complete HVAC Installations in a professional manner utilizing only proper workmanship.
- Establish customer rapport to sell the right products and services.
- Ask lifestyle questions to troubleshoot heating and cooling system malfunctions
- Educate and assist customers in choosing the best finance options and maintenance plans
- Explain replacement opportunities for aging, inefficient or underperforming systems.
- Understand your sales criteria and hold yourself accountable for exceeding revenue goals.
- Show yourself as professional and knowledgeable to win new referrals and repeat business.
- Work alongside customer service and dispatch to ensure overall success of the business.
- Complete paperwork and computer work in an accurate and timely manner to include, invoices, time cards, curbside feedback and option sheets.
- Be ready to work when scheduled and always arrive on time.
- Perform after hours on call service
- Complete an option sheet and curbside evaluation on every call.
- Maintain Truck Inventory per company policy
- Attend and participate in all Service Meetings to include regular and training meetings.
- Maintain certifications and seek additional education and certifications



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- Maintain a clean vehicle in and out
- Maintain personal and company equipment & tools to include check out and return per policy.
- Always maintain a professional image to include personal grooming, hygiene, clean and neat uniforms tucked in, organized tools and vehicles. No non company logoed attire.
- Learn, Understand and Follow the service system and company approved price guide.
- Ensure your vehicle is maintained per the manufacturer and company policies, noting any defects.

Position Standards

- Call Conversion Rates at 70% or more
- Overall Lead Generation Rate at 10% + and 40% on over 10 year old systems.
- ESA Sales Conversion Rate at 50% +
- ESA Renewal Rate at 85%+
- Call Backs less than 2%
- First time fix 90% or greater
- Customer Satisfaction at 100%
- Revenue at or above your plan
- Service System is followed properly
- Job Sites are picked up, vacuumed and left in a neat clean fashion.
- Price Guide is understood and used properly.
- Assist Other Technicians
- Always at work when scheduled and On Time.
- Understand on call schedule and available to work during on call scheduled times.
- Maintain full and accurate truck stock
- EPA, RMGA & Nate Certified
- Vehicle is maintained properly and clean.
- Drive Courteously
- Company Hygiene, Image and dress policy is followed
- Curbside feedback forms and options sheets are completed on every call
- Attends all scheduled meetings.



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Company-Wide Standards

Company Aspre

- Vision is understood.
- Core Values are embraced.

Accidents

Company is 100% accident Free.

No Bodily Injury Accidents

No Vehicle Accidents

No Property Damage accidents

Compliance

All work is performed in accordance with applicable laws, etc.

Company Processes and Systems

All routine procedures are documented in the UEAC, Inc. Operations Manual.

All work is performed according to documented systems.

All employees participate in Systems Improvement.

All Systems, forms, etc. are available to employees at any time.

Customer Service

Telephone calls, whether internal or external, will be returned within 2 hours.

No call will ever be unreturned at the end of any business day.

All client information, specifications, etc. are held strictly confidential.

All business communication is professional and respectful in tone and content.

E-mail returned within one business day.

Employee / Supervisor / Manager Relationships

Employees treat other employees as customers

Communication will be open between Employees, Supervisors and Managers.

Activities or assignments not on schedule must be discussed with Sup. or Mgr.

Employees will respect each other's time and space.

All employees will cover other areas of accountability when asked



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SIGNATURES:

STATEMENT OF POSITION HOLDER:

I accept the accountabilities of this position and agree to produce the results, perform the work, and meet the standards set fort in this position contract.

Date

Signature

Printed/Typed Name

STATEMENT OF POSITION HOLDER'S MANAGER:

I agree to provide a working environment, necessary resources, and appropriate training to enable the accountabilities of this position (results, work, and standards) to be accomplished.

Date

Signature

Printed/Typed Name