


Client Processes Playbook





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About Us:

Outsource Access is a comprehensive “business process outsourcing” and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their “Growth Partner” helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

Want to Take Next Steps? Scan the QR code and see a short video tour of our company and process with links to book a complimentary discovery call at:
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SALES



Task | Finding Leads in Construct Connect

Description of the Task: Navigating the platform to identify potential commercial and residential projects requiring HVAC services. This task is crucial as it helps target opportunities where HVAC systems are likely to be installed or upgraded, ensuring a steady stream of projects for the business and driving revenue growth.

1. Start by defining your search criteria within Construct Connect. Specify parameters such as project type (e.g., commercial or residential HVAC installations), location (geographical area or city), project stage (planning, bidding, or construction), and company size (large contractors or small firms). This tailored search helps filter potential leads that are most relevant to HVAC services.
2. Execute the search using the defined parameters. This will generate a list of potential leads that match your criteria. The results should include a range of projects or companies that could benefit from HVAC services.
3. Carefully review the generated list to ensure each lead meets your qualifications. Evaluate relevance based on how closely the projects align with your HVAC solutions, the presence of decision-makers within the organization, and the project's timeline to assess immediate opportunities.
4. Gather comprehensive information on qualified leads. This includes collecting details such as the company name, contact information (phone numbers, email addresses), specific project details (scope, requirements), and the key decision-makers involved (e.g., project managers, procurement officers).
5. Log in to your Salesforce account using your credentials to begin entering the collected lead information. This step ensures that all potential opportunities are captured and organized systematically within your CRM.
6. In Salesforce, navigate to the "Leads" section and create new lead entries. Input the information gathered from Construct Connect, including contact details, project specifics, and any relevant notes. Make sure to accurately record all pertinent data to facilitate effective follow-up.
7. Assign an appropriate status to each lead within Salesforce. Categories such as "New," "Contacted," or "Qualified" help prioritize follow-up actions and track the progress of each lead through the sales pipeline.
8. Create follow-up tasks and reminders in Salesforce for each lead. This includes scheduling calls, sending follow-up emails, and setting meetings to ensure timely and organized communication with potential clients. These tasks help maintain engagement and drive conversions.
9. Regularly monitor the status of leads in Salesforce. Update their progress and log all interactions to keep the lead database accurate and current. Adjust follow-up strategies based on lead responses and engagement levels to optimize the effectiveness of your outreach efforts.

Task | Qualifying and Assigning Leads

Description of the Task: Evaluating the potential of each lead based on criteria such as project scope, budget, and timeline, then delegating them to the appropriate sales team members. This process ensures that high-potential leads are prioritized and handled by the most suitable representatives, optimizing the sales pipeline and increasing conversion rates.

1. Begin by opening the email containing the Excel file attachment. Download and open the file to access the lead data.
2. In the Excel file, insert a new column immediately after the "Model Number" column. Label this new column "ADA/Accessories" to capture additional product details.
3. Sort the "Quantity" column from largest to smallest. Identify projects with at least 5 dryers as viable. Projects with 4 dryers are also considered if they include essential accessories like HEPA filters, recess kits, or wall guards.
4. Review the list and identify any projects related to chain stores with multiple branches (e.g., Walmart, Circle K, Wawa, Anytime Fitness). Remove these entries from the list as they are not eligible.
5. For each remaining project, click the listed Pipeline DR Link to access detailed project information.
6. On the Plan & Spec Alerts page, select either "Excel Dryer" or "Hand Dryers," depending on availability. Download the corresponding file.
7. Open the downloaded file and use the search function (Ctrl+F) to find mentions of "Dryer" within the document.
8. Save the specific page that mentions Excel Dryer as a PDF, and also save the entire Dodge report as a PDF.
9. Add the project to Salesforce by navigating to "SF Opportunities" on the left-side panel and selecting "Create Opportunity."
10. In Salesforce, ensure the record type is set to "Dodge - Project." Click "Next" to proceed with entering project details.
11. Fill in the required fields with information from the Dodge report, including vertical, rep number, account name, point of contact (POC), close date, basis of design, product interest, number of facilities, and opportunity size. Include the bid date in the opportunity name using numerical format (e.g., 11/12/2023).
12. Write general comments in Salesforce, starting with the Dodge number followed by project details. Include the specified hand dryer model, count, and indicate if the project will involve a general contractor bidding to the owner or construction manager. Add the date before the comment and your initials afterward. For example: "4/19/23 - Estimated 11 ThinAir TA-SB, GC bids to owner 6/29/23. (PM)"
13. Click "Save" to upload the opportunity to Salesforce. The opportunity record will open in a new window. Select the "Related" tab to add additional details.
14. Under the "Add products" section, enter the hand dryer model, quantity, and any specified accessories. Attach the PDF or Dodge report by selecting "Add files," and record any tasks associated with adding the opportunity.
15. Document tasks related to reading construction documents, qualifying projects, and adding them to Salesforce under the "Other" section for tracking purposes.
16. Schedule a task in Salesforce to email the opportunity to the assigned rep one week before the bid date.
17. Set a follow-up task for one month after the bid date to check on the project's status and progress.
18. If there are insufficient leads from the DPQ, manually search for additional projects in Dodge and qualify them as needed.

Task | Creating New Contact & Lead from SalesInbox

Description of the Task: Extracting relevant information from emails and other communications to populate the CRM system. This step is vital for maintaining an organized database of prospects and clients, allowing for efficient follow-ups, personalized outreach, and effective sales tracking.

1. Begin by logging into SalesInbox, where you will find emails and inquiries from potential leads. This platform is where new business opportunities are initially captured and managed.
2. Carefully review incoming emails to identify new potential leads. Look for key indicators such as inquiries about HVAC products, requests for quotes, or interest in specific services related to heating, ventilation, and air conditioning.
3. Extract essential details from the email, including the lead's name, email address, phone number, company name, and any specific questions or notes regarding their HVAC needs or project requirements.
4. Access the CRM (Customer Relationship Management) system used by your organization to manage contacts and leads. This system is where all client interactions and potential business opportunities are tracked.
5. Navigate to the "Contacts" section of the CRM and enter the extracted information to create a new contact record. Ensure that all fields are filled accurately, including contact details and any additional notes that may help in future interactions.
6. Proceed to the "Leads" section of the CRM and input the extracted information to create a new lead record. Link this new lead to the previously created contact record if applicable, ensuring all information is seamlessly integrated.
7. Add comprehensive notes to the lead record, detailing the context of the inquiry, any specific HVAC product or service requests, and relevant background information gleaned from the email. This will help the sales team understand the lead's needs more clearly.
8. Assign the new lead to the appropriate sales representative or team member based on predefined criteria, such as the lead's location, project type, or current workload of the sales team. This ensures that the lead is handled efficiently and by the right person.
9. Create follow-up tasks or reminders within the CRM for the assigned sales representative. This may include scheduling a call, sending additional information, or setting a meeting to discuss the lead's HVAC needs in detail.
10. Send a confirmation email from SalesInbox to the new lead, acknowledging receipt of their inquiry. Inform them that a sales representative will be in touch shortly to address their HVAC needs and provide further assistance. This helps in setting the right expectations and maintaining a professional image.

Task | Making Outbound Calls

Description of the Task: Reaching out to potential clients or existing customers to discuss HVAC service needs, introduce promotions, or follow up on inquiries. This task is important for establishing direct communication, building relationships, and closing deals, which are essential for business development and customer retention.

1. Check your Today's Tasks to confirm that a "Qualifying Call" is scheduled a month after the bid date. This ensures that you are on track with follow-up activities for the project.
2. Log in to the Dodge Project database and locate the specific project related to your task. Navigate to the "Related Companies" section to review details.
3. Look for any listed General Contractor (GC) in the project details. If a GC is mentioned, make a note of their contact information as your primary target for the call.
4. Before making the call, gather necessary information about the project and the GC. This will help you speak knowledgeably and ask pertinent questions.
5. Call the awarded General Contractor. Start the conversation by introducing yourself and explaining the purpose of your call. Ask to speak with the Project Manager (PM) or the person handling subcontractor assignments.
6. During the call, ask the GC's front desk or PM about the awarded subcontractor for specific components such as toilet accessories (Division 22), electrical (Division 26), or any relevant ISS (Integrated Systems Solutions) project components.
7. Record the details of your conversation, including the name and contact information of the subcontractor identified. This information will be essential for further follow-up and project management.
8. If no GC is listed in the Dodge Project details, contact the project's architect to inquire about the assigned GC. Note down the architect's contact details if additional follow-up is needed.
9. Once you have obtained the GC information from the architect, proceed to contact the awarded GC as initially planned.
10. After identifying the appropriate subcontractor, assign the project to the POC in your project management system.
11. Ensure that you check the "Send email notification" box when assigning the project. This will notify the POC about the new project assignment and any relevant details.
12. Keep track of any further actions required based on your conversation with the GC or architect. Ensure that all necessary steps are taken to facilitate smooth project management and communication.

Task | Assisting Outside Sales Team with Rep/Distributor Appointments

Description of the Task: Coordinating schedules, preparing meeting materials, and ensuring that all parties are informed and ready for discussions. This support is crucial for facilitating effective meetings, fostering partnerships with distributors, and driving sales through collaborative efforts with field representatives.

1. Begin by consulting with the outside sales team to collect detailed information about their specific needs, objectives, and preferences for rep or distributor appointments. This includes identifying target companies, preferred regions, key decision-makers, and any particular goals or criteria for the appointment.
2. Perform thorough research to identify potential reps and distributors who meet the HVAC service company's requirements. Focus on candidates with a strong industry reputation, relevant experience, and a proven track record in HVAC products or services.
3. Create a detailed contact list of potential reps and distributors. Include crucial details such as company names, contact persons, phone numbers, email addresses, and any additional relevant information that will facilitate communication and appointment scheduling.
4. Draft professional and engaging introductory emails or make phone calls to potential reps and distributors. Introduce the HVAC service company, highlight the value proposition, and assess their interest in exploring a partnership or scheduling an appointment.
5. Work closely with interested reps and distributors to arrange appointments. Ensure the scheduling aligns with both the availability of the outside sales team and the reps/distributors. Use scheduling tools or software to streamline this process and avoid conflicts.
6. Assemble and prepare all necessary materials for the appointments. This may include company profiles, detailed product/service information, presentation slides, brochures, and any relevant data or case studies that will support the discussion and presentation.
7. Send confirmation emails or make follow-up calls to both the outside sales team and the reps/distributors to verify the appointment details. Confirm the date, time, location, and agenda of the meeting to ensure all parties are aligned and prepared.
8. Keep an organized and up-to-date calendar of all scheduled appointments. Set reminders and track follow-up tasks to ensure that no appointments are missed and that all necessary actions are taken in a timely manner.
9. After the appointments, follow up with the reps and distributors to collect feedback, address any additional questions, and discuss potential next steps or further actions. This helps in gauging the effectiveness of the appointments and maintaining relationships.
10. Compile a comprehensive report summarizing the outcomes of the appointments. Include feedback from both the outside sales team and the reps/distributors, and provide recommendations for future appointments, strategies, and potential improvements.



OPERATIONS

Task | Managing Inventory of HVAC Parts and Supplies

Description of the Task: Overseeing the stock levels of essential HVAC components and supplies, including filters, thermostats, and ducts. It ensures that the inventory is well-organized, accurately tracked, and replenished timely to avoid shortages that could impact service delivery and project timelines.

1. Access the inventory management system or software used by your company to oversee HVAC parts and supplies. Ensure you have the necessary credentials and permissions to view and update inventory data.
2. Check the current stock levels for all HVAC components, such as filters, thermostats, compressors, and ductwork. Pay attention to quantities on hand, reorder points, and any low-stock alerts.
3. Input any recent changes in inventory, including new stock arrivals or items used. This ensures that the inventory database reflects the most accurate information.
4. Conduct periodic physical counts of HVAC parts and supplies to verify that the actual stock matches the records in your inventory system. Identify and reconcile any discrepancies between physical inventory and system records.
5. Based on stock levels and reorder points, place orders for replenishing low or out-of-stock items. Contact suppliers, review product catalogs, and ensure that orders meet the required specifications for HVAC components.
6. When new stock arrives, verify that the items match the order specifications and quantities. Inspect for any damage or defects in the HVAC parts and ensure proper documentation is completed.
7. Arrange HVAC parts and supplies in the storage area according to a logical system, such as categorizing by type, frequency of use, or manufacturer. Ensure that high-demand items are easily accessible.
8. Record new inventory arrivals and any changes in stock status in the inventory management system. Include details such as quantities received, storage locations, and any relevant notes about the condition of the items.
9. Track the usage patterns of HVAC parts and supplies to anticipate future needs. Analyze trends to optimize inventory levels, reduce excess stock, and minimize shortages.
10. Create and review regular reports on inventory status, including stock levels, turnover rates, and upcoming reorder needs. Use these reports to make informed decisions about purchasing and inventory management.
11. Communicate with the procurement team or purchasing department to align inventory management efforts with overall supply chain strategies. Share insights on inventory trends and any issues that may impact procurement.
12. Manage any returns or exchanges of defective or incorrect HVAC parts. Ensure that returned items are documented, and the inventory system is updated accordingly.

Task | Coordinating and Managing Client Appointments

Description of the Task: Scheduling and organizing appointments with clients for HVAC service calls, installations, or maintenance. Effective coordination ensures that technicians are dispatched efficiently and clients receive timely service, enhancing customer satisfaction and operational efficiency.

1. Log into the company's scheduling software or CRM system where client appointments are tracked. Ensure you have appropriate access rights to view and update appointment information.
2. Check for incoming appointment requests from clients, which may come via email, phone calls, or online forms. Note the details such as the client's name, contact information, and preferred appointment times.
3. Consult the calendar or schedule of available HVAC technicians to determine their availability. Consider factors such as location, expertise required, and current workload to match the right technician to the appointment.
4. Contact the client to confirm the details of the appointment, including the service requested (e.g., installation, maintenance, repair), preferred date and time, and specific requirements or issues with their HVAC system.
5. Enter the confirmed appointment details into the scheduling system. Include all relevant information such as client contact details, service type, technician assigned, and any special instructions.
6. Email or text the client a confirmation of the appointment. Include all relevant details such as date, time, technician's name, and any preparations the client should make (e.g., clearing access to HVAC units).
7. Notify the assigned technician of the new appointment. Provide them with the client's information, service request details, and any special instructions. Ensure they acknowledge the appointment.
8. Handle any rescheduling or cancellations promptly. Update the scheduling system with new details and notify both the client and technician of the changes. Confirm the new appointment details with the client.
9. Monitor the status of scheduled appointments to ensure they are completed as planned. Follow up with technicians to confirm they have attended the appointment and address any issues or delays.
10. After the appointment, update the client's records in the CRM system with details on the service performed, technician's notes, and any follow-up actions required. Ensure all data is accurate and up-to-date.
11. Contact clients post-appointment to ensure they are satisfied with the service provided. Address any additional questions or concerns they may have and offer to schedule any needed follow-up appointments.
12. Create regular reports summarizing appointment activity, including completed, pending, and canceled appointments. Use these reports to analyze trends, technician performance, and client satisfaction.

Task | Handling Customer Inquiries

Description of the Task: Responding to and managing customer questions and concerns related to HVAC services, including troubleshooting, service options, and pricing. Prompt and accurate handling of inquiries helps build trust, improve client relationships, and support informed decision-making.

1. Regularly check all channels where customer inquiries may be received, including email, phone lines, live chat, and online forms. Ensure you have access to all necessary communication tools.
2. Upon receiving an inquiry, promptly acknowledge receipt to the customer. If the inquiry is via email or online form, send an automated or personalized acknowledgment message confirming that their request is being processed.
3. Review the inquiry to determine its nature—whether it's a question about HVAC systems, a service request, a complaint, or a request for a quote. Categorize the inquiry to ensure it is addressed appropriately.
4. Collect necessary details from the customer to address their inquiry effectively. This may include their contact information, the type of HVAC system they have, any specific issues they are experiencing, and their location.
5. If the inquiry requires technical knowledge or involves specific service details, consult with the relevant department or HVAC technicians. Ensure you have accurate and up-to-date information to provide a comprehensive response.
6. Draft a detailed and clear response to the customer's inquiry. Address their questions or concerns, provide necessary information about HVAC services, repair options, or product details, and offer guidance on next steps.
7. Include information on additional resources, such as how to book a service appointment, contact details for further questions, or links to helpful articles and FAQs on HVAC systems.
8. Record the details of the customer inquiry and your response in the CRM or customer management system. Include information such as the date and time of the inquiry, the nature of the request, and any follow-up actions taken.
9. If the inquiry requires further action or if you promised additional information, schedule a follow-up to ensure the customer's needs are fully met. Send follow-up emails or make follow-up calls as appropriate.
10. After resolving the inquiry, check in with the customer to ensure they are satisfied with the response and resolution. Collect feedback to improve the handling of future inquiries.
11. If the inquiry reveals common questions or issues, update the company's knowledge base or FAQ section to help address similar inquiries in the future. This helps streamline responses and improve customer service efficiency.
12. Regularly review customer inquiries and responses to identify trends or recurring issues. Prepare reports to share with management or relevant teams to enhance service quality and address any systemic issues.

Task | Coordinating Services Dispatch

Description of the Task: Scheduling and dispatching HVAC technicians or service teams to job sites based on service requests. Proper coordination ensures that the right personnel are sent to the correct locations, optimizing service delivery and minimizing downtime for clients.

1. Monitor and collect service requests from various sources, including phone calls, emails, and online forms. Review each request to determine its urgency, nature (e.g., HVAC repair, installation, maintenance), and specific requirements.
2. Evaluate and prioritize the service requests based on factors such as the severity of the issue, customer urgency, and the availability of HVAC technicians. Ensure emergency requests are flagged and addressed promptly.
3. Confirm the customer's contact information, service address, and any specific details related to the HVAC system or issue. Ensure all information is accurate to facilitate smooth dispatch and service delivery.
4. Check the availability and skill set of HVAC technicians in the dispatch system or calendar. Match the service request with the appropriate technician based on their expertise and proximity to the service location.
5. Contact the assigned technician to confirm their availability and schedule the service appointment. Update the technician's calendar with the appointment details, including date, time, and location.
6. Inform the customer of the scheduled appointment, providing them with details such as the technician's name, the estimated arrival time, and any preparation they need to make before the service. Confirm the customer's availability and address any questions they might have.
7. Enter all relevant information about the service request, appointment, and assigned technician into the dispatch system or CRM. Ensure records are up-to-date and accurately reflect the status of each service request.
8. Track the status of active service requests and technician progress throughout the day. Address any issues or delays that may arise and adjust schedules as needed to maintain efficient service delivery.
9. After the service has been completed, verify that the technician has submitted a service report or completed a job ticket. Contact the customer to confirm their satisfaction with the service and collect any feedback on their experience.
10. Record the outcome of the service request in the dispatch system, including any follow-up actions required or additional services needed. Schedule any follow-up appointments or maintenance checks as necessary.
11. Maintain open communication with HVAC technicians and management to report any issues, provide updates on service requests, and address any operational challenges. Ensure that all team members are aligned and informed.

Task | Managing Customer and Job Records

Description of the Task: Maintaining detailed records of customer interactions, service histories, and job specifics. Accurate record-keeping supports efficient job management, enhances customer service, and provides valuable data for future reference and business analysis.

1. Begin by accessing the customer and job records within the CRM or database system. Review the existing records to ensure they are current and complete, noting any updates or changes required.
2. For any new or updated customer information, such as contact details, service history, or preferences, update the customer profiles in the CRM system. This includes adding new addresses, phone numbers, and email addresses as needed.
3. For each job request or completed service, document all relevant details in the job record. This includes job type (e.g., repair, installation, maintenance), service date, technician assigned, parts used, and labor hours.
4. Enter information on the outcome of each job, including the resolution of issues, any follow-up actions needed, and customer feedback. Ensure that all service reports, including details of any repairs or installations, are accurately recorded.
5. Regularly monitor and update the status of ongoing jobs, from initiation through completion. This includes marking jobs as in-progress, completed, or pending, and noting any delays or issues encountered.
6. Attach relevant documents to customer and job records, such as service agreements, invoices, warranty information, and job tickets. Ensure all documentation is easily accessible and organized within the CRM system.
7. Communicate with HVAC technicians to gather additional information on job status or customer feedback. Ensure that all relevant details from technicians' reports are accurately entered into the records.
8. Create reports based on customer and job records for analysis and review. This includes generating summaries of job performance, customer satisfaction, and service metrics to support operational decision-making.
9. Implement measures to secure customer and job records, ensuring that sensitive information is protected and accessible only to authorized personnel. Follow best practices for data confidentiality and compliance with regulations.
10. Track any outstanding or pending jobs and follow up with customers or technicians as necessary. Schedule any required follow-up services or appointments to ensure that all job requests are fully addressed.
11. Once a job is fully completed and all relevant information has been recorded, archive the job records as per company policy. Ensure that archived records are stored securely and can be retrieved easily if needed.



HR & RECRUITMENT

Task | Managing Job Postings for HVAC Techs and Support Staff

Description of the Task: Creating, publishing, and updating listings for HVAC technicians and support staff across various job platforms. This task ensures that job descriptions are tailored to attract qualified candidates with specific HVAC skills and certifications. This process helps to fill vacancies efficiently and source skilled talent essential for maintaining high-quality service delivery.

1. Begin by consulting with the HR team or hiring manager to understand current staffing needs and requirements for HVAC technicians and support staff. Determine the specific skills, certifications, and experience levels required for each role.
2. Create detailed and accurate job descriptions for each position. Include key responsibilities, required qualifications (e.g., HVAC certification, technical skills), and desired experience. Highlight any specific duties related to HVAC systems, such as installation, maintenance, or troubleshooting.
3. Identify appropriate platforms for posting the job openings. This could include HVAC industry-specific job boards, general job sites (e.g., Indeed, LinkedIn), and local community boards. Consider also reaching out to trade schools or vocational programs with HVAC training.
4. Use the chosen platforms to post the job openings. Ensure that each listing includes the job title, detailed description, company information, application instructions, and any deadlines. Optimize the postings with relevant keywords to attract qualified candidates.
5. Regularly check the job postings for incoming applications. Use an applicant tracking system (ATS) or CRM to organize and manage resumes and cover letters. Screen applications to ensure they meet the basic qualifications for the role.
6. Send acknowledgement emails to candidates who apply, confirming receipt of their application. If needed, request additional information or clarification from candidates regarding their qualifications or experience.
7. Coordinate with the hiring team to schedule interviews with shortlisted candidates. Send out interview invitations, provide details on the interview format (e.g., virtual or in-person), and confirm dates and times.
8. If a position is filled or if there are changes in the job requirements, update the job postings accordingly. Remove or mark closed positions on job boards and platforms to ensure that the listings remain accurate and up-to-date.
9. Monitor the performance of each job posting, including metrics such as the number of views, applications received, and candidate quality. Analyze this data to determine the effectiveness of different job boards and adjust the posting strategy as needed.
10. Regularly update the hiring team on the status of job postings and candidate progress. Share feedback and any relevant insights on the candidate pool to assist in the decision-making process.
11. For highly qualified candidates who may not fit the current openings, maintain a talent pool for future opportunities. Engage with these candidates periodically to keep them informed about potential future openings.

Task | Facilitating the Onboarding Process for New HVAC Techs

Description of the Task: Preparing and delivering orientation materials, training new HVAC technicians on company protocols, and ensuring they are equipped with the necessary tools and information. This process is crucial for integrating new hires smoothly into the team, familiarizing them with HVAC service standards, and setting them up for success in their roles.

1. Gather and organize all necessary onboarding documents and materials, including company handbooks, HVAC safety protocols, equipment manuals, and service standards. Ensure that these materials are up-to-date and relevant to the HVAC industry.
2. Coordinate with the new HVAC tech to set up an orientation session. This includes scheduling a time for them to meet with key team members, such as the HR manager, supervisor, and lead technician, and ensuring that the session covers all critical aspects of their new role.
3. During the orientation, provide an overview of the company's mission, values, and culture. Explain the HVAC-specific procedures, including safety regulations, customer service expectations, and standard operating procedures (SOPs) related to HVAC installations and maintenance.
4. Ensure that the new HVAC tech receives all necessary equipment, such as tools, uniforms, and a company vehicle if applicable. Set up their access to internal systems, including scheduling software, CRM tools, and any industry-specific applications they will need for their daily tasks.
5. Arrange for hands-on training sessions that cover essential HVAC skills and knowledge. This may include training on specific HVAC systems, troubleshooting techniques, and customer interaction protocols. Coordinate with experienced technicians to provide mentorship and guidance.
6. Assist the new hire in completing all required HR documentation, including tax forms, benefit enrollment, and certification verification. Ensure that all necessary certifications and licenses related to HVAC work are recorded and verified.
7. Conduct a thorough review of health and safety protocols specific to HVAC work. This includes training on proper handling of refrigerants, electrical safety, ladder safety, and emergency procedures.
8. Outline performance goals and expectations for the new HVAC tech. Discuss key performance indicators (KPIs), such as job completion times, customer satisfaction scores, and adherence to safety standards.
9. Arrange for the new tech to meet with their assigned mentor, supervisor, and other team members. This helps them integrate smoothly into the team and understand the roles and responsibilities of their colleagues.
10. Set up regular follow-up meetings with the new HVAC tech to assess their progress, address any concerns, and provide additional support as needed. This helps ensure they are adapting well to their new role and receiving the necessary resources to succeed.

Task | Processing Payroll for Office Staff

Description of the Task: Calculating and disbursing salaries for office staff, ensuring accuracy in wage computation, and adhering to relevant tax and benefits regulations. This task is vital for maintaining employee satisfaction and financial compliance, as it ensures timely and accurate compensation, contributing to overall morale and organizational trust.

1. Collect all time and attendance records for the office staff, including hours worked, overtime, and any leave taken. Ensure that the records are accurate and up-to-date by cross-checking with the HVAC job schedules and timesheets.
2. Review and verify employee details such as job titles, pay rates, and deductions. Ensure that all information is current and accurate in the payroll system, reflecting any recent changes in roles or compensation.
3. Calculate the gross wages for each office staff member based on their hourly rates or salaries, including any overtime pay for additional hours worked supporting HVAC field operations.
4. Apply the necessary deductions for federal, state, and local taxes, as well as any employee benefits such as health insurance, retirement contributions, and other deductions specific to the HVAC industry.
5. Conduct a thorough review of the payroll calculations to ensure accuracy. Check for any discrepancies or errors in the calculations and rectify them. Obtain approval from the HR manager or the financial controller before finalizing the payroll.
6. Set up direct deposit transactions for employees who receive their pay electronically. For those who prefer physical checks, prepare and print the checks. Ensure timely processing so that all office staff are paid on the designated payday.
7. Create detailed payroll reports that summarize the total wages paid, deductions made, and any other relevant financial data. These reports are essential for financial tracking and compliance in the HVAC industry.
8. Ensure that all office staff receive their pay stubs, either electronically or in paper form. Pay stubs should clearly outline the gross wages, deductions, and net pay, along with any specific notes related to HVAC projects or support activities.
9. Update and maintain accurate payroll records for each office staff member, ensuring compliance with industry regulations and company policies. This includes keeping track of all payroll transactions and any adjustments made.
10. Address any questions or concerns from office staff regarding their payroll. This may include clarifying deductions, correcting errors, or providing explanations for any changes in their pay.
11. Regularly reconcile payroll accounts with the company's financial records to ensure accuracy and consistency. This helps in identifying and resolving any discrepancies early.
12. Keep informed about the latest payroll regulations and tax laws that affect the HVAC industry. Ensure that the company's payroll practices are compliant with these regulations to avoid any legal issues.

Task | Maintaining HVAC Tech Records

Description of the Task: Organizing and updating personal and professional information for HVAC technicians, such as certifications, training history, and performance reviews. Proper record-keeping is essential for tracking compliance with industry standards, managing career development, and ensuring that all staff credentials are up-to-date for effective field operations.

1. Gather all relevant personal and professional information from new HVAC technicians, including contact details, certifications, work history, and emergency contact information.
2. Enter the collected information into the company's HR management system or database. Ensure that each HVAC technician has a comprehensive and up-to-date digital profile, including scanned copies of certifications and licenses.
3. Record details of all training sessions, certifications, and licenses acquired by the HVAC technicians. Update their profiles with the dates, types of certifications, issuing bodies, and expiration dates if applicable.
4. Maintain a detailed log of each technician's work assignments, including job sites, project details, and specific tasks performed. This helps in tracking their experience and expertise in different aspects of HVAC work.
5. Schedule regular performance reviews and document the feedback, ratings, and any areas for improvement. Record these evaluations in the technician's profile to track their progress and development over time.
6. Keep an accurate record of each technician's attendance, including working hours, overtime, sick leave, vacation days, and any other types of leave. Ensure this information is regularly updated in their profiles.
7. Ensure that all required compliance documents, such as safety training records, insurance certificates, and background checks, are stored and maintained. Regularly audit these records to ensure compliance with industry regulations and company policies.
8. Regularly verify and update the contact information for each HVAC technician to ensure accurate communication. This includes phone numbers, email addresses, and emergency contact details.
9. For former employees, archive their records securely while ensuring that all data retention policies are followed. Keep records accessible for reference if needed for future verification or inquiries.
10. Implement and follow strict data security protocols to protect the personal and professional information of the HVAC technicians. Ensure that only authorized personnel have access to sensitive records.
11. Create periodic reports summarizing the status of technician records, including certification renewals, training needs, and compliance status. Share these reports with management to aid in workforce planning and development.
12. Ensure that HVAC technicians have access to their own records for review and updates. Provide a secure method for them to view and request changes to their information if necessary.

Task | Assisting with Employee Engagement Activities

Description of the Task: Organizing events, recognition programs, and team-building exercises tailored to the HVAC team. These activities foster a positive work environment, improve morale, and enhance teamwork among HVAC technicians and support staff. By engaging employees effectively, this task helps to boost job satisfaction and retention rates within the company.

1. Collaborate with the HR team and management to identify the specific engagement needs and interests of HVAC technicians and office staff.
2. Develop a calendar of employee engagement activities, such as team-building events, training sessions, wellness programs, and social gatherings.
3. Work with the finance department to allocate a budget for each planned activity. Ensure that the budget covers all necessary expenses, including venue bookings, materials, refreshments, and any external facilitators or trainers.
4. Handle the logistics for each activity, including booking venues, arranging transportation for field technicians, and coordinating with vendors. Ensure all necessary materials and equipment are prepared in advance.
5. Create and distribute engaging invitations and announcements for each activity. Use multiple channels such as email, company intranet, and bulletin boards to ensure all employees are informed and encouraged to participate.
6. Manage RSVPs and attendance for each event. Maintain a list of participants to ensure adequate resources are allocated and to track employee engagement levels.
7. Encourage participation by addressing any barriers that might prevent employees from joining activities. This could include coordinating schedules, providing childcare options, or offering transportation solutions.
8. On the day of the event, be present to greet participants, facilitate introductions, and ensure the smooth running of activities. Address any issues that arise promptly and ensure everyone feels included and engaged.
9. After each activity, collect feedback from participants through surveys or informal discussions. Assess the success of the event and gather suggestions for future improvements.
10. Compile feedback and attendance data into a report for management. Highlight the successes, challenges, and overall impact of the engagement activities on employee morale and team cohesion.
11. Acknowledge and appreciate employees who contributed to or excelled in the activities. This could be through public recognition, certificates, or small rewards.
12. Keep detailed records of all engagement activities, including planning documents, budgets, feedback, and participation metrics. Use this data to track trends and improve future initiatives.
13. Foster a culture of continuous engagement and open communication. Encourage employees to share their ideas for activities and initiatives, and ensure management is supportive of these efforts.



FINNANCE

Task | Generating Invoices for Completed HVAC Projects

Description of the Task: Creating detailed invoices for clients once HVAC projects are completed. It includes listing services rendered, parts used, and labor costs, ensuring accuracy for client billing. Generating precise invoices is crucial for maintaining cash flow, client trust, and financial transparency in the HVAC industry.

1. Start by confirming that the HVAC project is fully completed by cross-referencing the job completion report from the field technicians and ensuring all tasks have been marked as complete in the project management system.
2. Collect all relevant details of the completed project, including labor hours logged by HVAC technicians, parts and materials used, and any additional services provided.
3. Log into the company's invoicing software or accounting system where invoices are generated and managed. Make sure you have the necessary permissions to create and send invoices.
4. In the invoicing system, initiate the creation of a new invoice. Select the appropriate client from the customer database and ensure their contact information is accurate and up-to-date.
5. Enter the specific details of the completed HVAC project. This includes the date of service, a detailed description of the work performed, itemized list of parts and materials used, labor hours, and corresponding rates.
6. Verify the accuracy of the total amount due by summing up the costs of parts, materials, and labor. Include any applicable taxes or discounts as per the client agreement or promotional offers.
7. Attach any relevant supporting documents, such as service reports, technician notes, and warranty information for installed HVAC components, to provide transparency and clarity to the client.
8. Double-check all entered information for accuracy. Ensure the invoice complies with the company's invoicing policies and guidelines. If required, send the invoice for approval to a supervisor or the finance department.
9. Once approved, send the invoice to the client via the preferred method (email, mail, or through an online portal). Ensure the subject line and email body clearly reference the completed HVAC project and include contact details for any invoice-related queries.
10. Log the sent invoice in the company's accounting system, updating the project status to indicate billing is complete. This helps in tracking outstanding payments and maintaining accurate financial records.
11. Schedule a follow-up reminder in the CRM or calendar to check on the payment status if the invoice remains unpaid past the due date. Ensure timely communication with the client to address any issues or questions they may have regarding the invoice.
12. Once payment is received, record the transaction in the accounting system, mark the invoice as paid, and update the client's account to reflect the received payment.

Task | Tracking Outstanding Payments from Customers

Description of the Task: Monitoring the accounts receivable ledger to identify overdue invoices and follow up with customers for prompt payment. This task is essential to ensure steady revenue streams, prevent cash flow issues, and maintain healthy financial operations within the HVAC services sector.

1. Log into the company's accounting or invoicing software where customer invoices and payment records are maintained. Ensure you have the necessary permissions to view and update payment information.
2. Generate an aged receivables report to identify outstanding invoices. This report categorizes overdue payments by the length of time they have been outstanding (e.g., 30, 60, 90 days).
3. Highlight the invoices that are past due. Pay particular attention to large balances or long-overdue accounts, as these may require more immediate action.
4. Ensure that the contact details for each customer with an outstanding payment are accurate and up-to-date. This includes phone numbers, email addresses, and billing addresses.
5. Draft reminder emails or call scripts tailored to the HVAC industry. Include details such as the invoice number, date of service, amount due, and a friendly reminder of the payment terms. Ensure the tone is professional and courteous.
6. Send out the initial payment reminders to customers with outstanding balances. Use the preferred method of communication (email, phone call, or mail) as specified by the customer's preferences or past interactions.
7. Record the details of each follow-up action in the CRM or accounting system. Include the date of contact, the method used, and any responses or promises of payment from the customer.
8. Keep track of any responses received from customers. Update the status of each invoice in the system accordingly, noting any partial payments or agreements for payment plans.
9. For accounts that remain unpaid after initial follow-ups, escalate the collection efforts. This may involve sending more formal demand letters, involving a collections agency, or notifying the customer of potential service interruptions.
10. Inform the sales and service teams about overdue accounts, especially if ongoing service or future sales are impacted. Ensure all teams are aligned on the status of the customer's account.
11. Set up a regular schedule to review the status of outstanding payments (e.g., weekly or bi-weekly). Update the aged receivables report and prioritize follow-up actions based on the latest data.
12. Throughout the process, aim to maintain positive relationships with customers. Offer assistance and flexibility where possible, such as setting up payment plans or providing additional payment options.
13. Once payments are received, update the customer's account in the accounting system. Mark the invoice as paid, record the payment details, and adjust the aged receivables report to reflect the updated status.

Task | Compiling Financial Data for Tax Documents

Description of the Task: Gathering and organizing all relevant financial information, including income, expenses, and deductions, to prepare accurate tax documents. This task is vital for compliance with tax regulations, minimizing liability, and ensuring the HVAC business remains in good standing with tax authorities.

1. Log into the company's accounting software and any other relevant financial systems where income, expenses, and other financial transactions are recorded.
2. Retrieve the income statements for the relevant tax period. This includes detailed records of revenue generated from HVAC installations, maintenance services, and sales of parts and equipment.
3. Collect all expense reports for the same period. Ensure to include costs related to HVAC parts procurement, technician salaries, vehicle expenses, office supplies, utilities, and any other operational expenses.
4. Access payroll records to compile data on wages, benefits, and any other compensation paid to HVAC technicians and office staff. Include any bonuses or commissions paid during the tax period.
5. Sort through all invoices sent to clients and receipts received from suppliers. Ensure that all financial documents are categorized correctly and matched with corresponding transactions in the accounting system.
6. Retrieve bank statements for the tax period. Cross-check these statements with the income and expense records to ensure all transactions are accurately recorded and reconciled.
7. List any significant purchases of HVAC equipment, vehicles, or other assets. Include details such as purchase dates, costs, and depreciation schedules if applicable.
8. Identify and compile all tax-deductible expenses specific to the HVAC industry. This may include training costs for technicians, certifications, business travel, and marketing expenses.
9. Gather records of sales tax collected from clients and sales tax paid on purchases. Ensure that all sales tax transactions are accurately recorded for compliance purposes.
10. Generate and review financial statements, including the balance sheet and cash flow statement, to ensure all financial data is accurate and complete. Check for any discrepancies or missing information.
11. Prepare detailed profit and loss (P&L) statements for the tax period. This statement should clearly show the company's revenues, costs, and expenses to determine the net profit or loss.
12. If the company uses external accountants or tax advisors, prepare and provide them with the compiled financial data. Ensure all requested documents are included and accessible.
13. Double-check that all compiled financial data meets the compliance requirements for tax filing. Ensure adherence to any specific regulations or guidelines applicable to the HVAC industry.
14. Organize and securely store all compiled financial data and supporting documents. Ensure that all records are easily accessible for future reference or audits.

Task | Handling Payments to Suppliers of HVAC Parts and Equipment

Description of the Task: Processing and managing payments to suppliers for HVAC parts and equipment, ensuring timely and accurate transactions. Efficient handling of supplier payments is critical for maintaining strong vendor relationships, ensuring the availability of essential parts, and preventing project delays in the HVAC industry.

1. Log into the company's accounting software or financial management system to access all incoming supplier invoices. Ensure you have invoices for all HVAC parts and equipment procured.
2. Review each supplier invoice to verify details such as the supplier name, invoice number, date, itemized list of HVAC parts and equipment, quantities, prices, and total amount due. Ensure that all charges are accurate and correspond to received goods or services.
3. Match each supplier invoice with the corresponding purchase order and delivery receipt. Confirm that the items invoiced were indeed ordered and delivered as per the purchase agreement.
4. Note the payment terms stated on each invoice, such as due dates, early payment discounts, and any penalties for late payments. Prioritize payments based on these terms to optimize cash flow and take advantage of discounts.
5. Forward invoices to the relevant manager or department head for approval. Ensure that all necessary approvals are obtained before processing payments, following the company's internal procedures.
6. Create payment vouchers for each approved invoice. Include details such as the supplier's name, invoice number, total amount, payment method, and due date. Ensure all information is accurate and complete.
7. Enter payment details into the company's accounting software. Schedule payments according to the due dates and payment terms. Use electronic funds transfer (EFT), checks, or other approved payment methods.
8. Record the payment details in the supplier's account within the accounting system. Update records to reflect the payment status and maintain accurate financial data.
9. Once the payment is processed, send a payment confirmation email to the supplier. Include details such as the invoice number, payment amount, and payment date. This ensures transparency and keeps the supplier informed.
10. Periodically reconcile bank statements with the accounting records to ensure that all payments to suppliers are accurately recorded. Address any discrepancies promptly to maintain accurate financial records.
11. Organize and store all payment-related documents, including invoices, payment vouchers, approval records, and payment confirmations. Ensure these documents are easily accessible for future reference or audits.
12. Regularly review accounts payable to monitor any outstanding payments. Follow up with suppliers if there are any issues or discrepancies in payments to maintain good supplier relationships.



ADMINISTRATIVE

Task | Scheduling Presentations

Description of the Task: Coordinating the logistics for meetings and presentations with clients, stakeholders, and team members. This includes setting up dates and times, booking meeting rooms or virtual platforms, and ensuring all necessary materials and equipment are prepared.

1. The HVAC sales or engineering team will request assistance in scheduling presentations with potential clients, contractor firms, or stakeholders.
2. Determine the specific companies or organizations the team wants to present to, focusing on those relevant to HVAC services, such as building contractors, facility managers, or architectural firms.
3. Look up contact information for key decision-makers at the targeted firms. This could include facilities managers, project coordinators, or lead engineers. If information is not available publicly, prepare to make calls to the firm's main office to gather the necessary details.
4. Call the receptionist or the main office of the targeted firm to identify the appropriate contact person for scheduling presentations. Explain the purpose of your call and request to speak with the person in charge of scheduling or the resource librarian.
5. Once in touch with the correct contact, ask about their availability for the proposed presentation dates. If the initial dates are not feasible, inquire about alternative dates or their general availability for future scheduling.
6. Confirm whether the presentation will be in-person or virtual. If in-person, verify the location and any specific requirements they might have. If virtual, ensure they have the necessary technology to support the presentation.
7. Gather all relevant details, including date, time, location (or virtual platform details), and any specific requirements or preferences from the contact. Also, ask if there are any particular topics or products they are interested in to tailor the presentation.
8. Relay the gathered information to the HVAC team members who requested the presentation. Ensure they are aware of all the details and have the necessary materials and equipment prepared.
9. Send a confirmation email to both the internal team and the contact person at the targeted firm. Include all the details of the presentation, ensuring there is a clear understanding of the schedule and expectations.
10. Schedule a reminder in your calendar to follow up a few days before the presentation date to confirm everything is still on track and address any last-minute adjustments or requirements.

Task | Managing Email

Description of the Task: Overseeing the inbox, organizing messages, responding to inquiries, and prioritizing communications. This task ensures that important emails from clients, suppliers, and team members are addressed promptly and efficiently. In the HVAC industry, effective email management is essential for maintaining clear communication, keeping projects on track, and providing timely customer support.

1. Begin by organizing incoming emails into relevant folders or labels such as "Urgent Requests," "Client Inquiries," "Project Updates," or "Supplier Communication." This ensures that HVAC-related communications are categorized based on their urgency, sender, or subject, facilitating easier access to critical messages and improving workflow efficiency.
2. Go through the sorted emails and assess their urgency and importance. Flag or mark emails that require immediate attention, such as client requests for HVAC system repairs or urgent supplier notifications, ensuring that these are addressed promptly.
3. Reply to emails that can be resolved quickly, such as confirming appointment times or acknowledging receipt of a client's service request. For more complex inquiries or tasks, delegate the email to the appropriate team members or departments, such as forwarding technical questions to the HVAC engineers or routing purchase orders to the procurement team.
4. Use the email client's calendar function to set up meetings, service appointments, or reminders. This includes scheduling HVAC system inspections, coordinating with clients for maintenance services, or organizing team meetings to discuss upcoming HVAC projects.
5. Monitor emails that require follow-up, such as pending responses from clients or unresolved issues with HVAC installations. Set reminders or flags to ensure these actions are completed on time, preventing important tasks from being overlooked.
6. Prepare and send emails on behalf of the team or employer, ensuring that communications are clear, professional, and tailored to the HVAC industry. This includes drafting proposals for new HVAC installations, responding to service inquiries, or providing updates on ongoing projects.
7. Implement email filters and rules to automatically sort messages based on criteria such as sender, subject line, or keywords. Prioritize emails from key contacts like major clients or important suppliers, and reduce distractions by filtering out irrelevant or spam emails.
8. Periodically review and manage the email inbox by archiving or deleting outdated messages, unsubscribing from unnecessary mailing lists, and organizing stored emails. This helps maintain a clutter-free and organized inbox, improving overall email management and ensuring that important HVAC-related communications are easily accessible.