BLUE COLLAR BLUEPRINT

CUSTOMER'S CHOICE SERVICE CALL PLAYBOOK

HVAC TECHNICIAN TRAINING



Build Trust. Diagnose Carefully. Explain Choices.

CUSTOMER'S CHOICE
Service Call Playbook

HVAC Edition

Kerry S. Webb

A practical guide for service technicians

Prepare for the call, understand the customer's concern, investigate carefully, explain supported choices, complete authorized work, and help the customer care for the system.

This playbook combines six learning sections with field tools for documentation, authorization, coaching, and implementation. Practice the conversations, apply the checkpoints, and use the field records to make each next step clear.

Use alongside company procedures, manufacturer instructions, and the training required for the equipment and work. Instructor answers and scoring guidance are provided separately.

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How to use the playbook

Work through one section at a time. Read the standard, practice with a partner, answer the judgment questions, and apply the skill on calls with coaching. Use the appendices as working tools and follow the readiness plan before independent field use.

Section 1

Character and Competence

Prepare to serve before you do the repair. Your responsibility is to arrive ready, separate facts from assumptions, work within your qualifications, and keep the customer informed. These habits support the rest of the CHOICE service call.

Author Kerry S. Webb

The standard

Character means telling the truth, respecting the home, honoring the customer's decisions, and owning mistakes. Competence means using the right information, equipment, procedures, and support to do the work correctly. Neither replaces the other: a courteous explanation does not validate an untested diagnosis, and a correct repair does not excuse unauthorized work.

What you will demonstrate

- Complete a prearrival RESET while safely parked, using the call history and a clear readiness check.
- Describe what is known, what is reported, and what still needs verification.
- Explain a finding without exaggerating its cause, consequence, or urgency.
- Recognize when to pause, obtain approval, or involve a qualified supervisor.
- Record one specific behavior to improve and demonstrate it on subsequent calls.

Where this stage ends

This stage prepares you for the visit. Happy Hello introduces you and confirms the visit process. Overview and Discovery review the customer's history and concerns. Inspect, Diagnose and Inform establishes findings and obtains repair authorization. Complete and Confirm verifies the work and closes the transaction. Educate and Extend Care establishes aftercare and agreed follow-up.

Do not jump from a dispatch note to a repair recommendation. At the end of this stage, you should be ready to greet the customer—not already committed to a diagnosis.

Prepare before arrival

Attitude and energy on arrival

A difficult previous call, a late schedule, or an incomplete dispatch note can affect your next decision. Pause before entering the property. Bring a calm, attentive manner rather than forced enthusiasm. Do not review records or complete this checklist while driving.

Use the RESET routine

Step	Action
R REVIEW	Read the customer's concerns, equipment history, prior repairs, access notes, and unresolved promises. Treat prior diagnoses as information to verify.
E ESTABLISH your purpose	Commit to understanding the concerns, testing before recommending, and explaining the next step clearly.
S SUPPLIES and safety	Check task-appropriate tools, PPE, home protection, instrument readiness, and likely parts. Confirm compatibility before promising a repair.
E EXPECTATIONS	Check the appointment window, diagnostic fee information, access arrangements, and who can authorize work. Flag unknowns.
T TRANSITION	Park respectfully, secure the vehicle, organize what you need, and approach without rushing. Notify the office of material delays.

Prepare to adapt

Prepared to win

Review the record before asking the customer to repeat it, then confirm whether anything has changed. A stocked truck helps, but an available part does not prove the part is needed. If the correct equipment, qualification, or documentation is missing, arrange support before starting that task.

Say: "I reviewed the earlier visit notes. I'll confirm what has changed and test the system before recommending work."

Do: Resolve readiness gaps or seek dispatch support. Verify promised parts and timing before repeating them.

Document: Record the open issue, responsible person, and next update. Keep suspected causes unconfirmed.

Manager checks: Ask for one known fact, one unknown, and the appropriate next step.

Put Values into Decisions

Values in action

Values become visible when a shortcut would be easier. Protect the home using measures appropriate to the work and footing conditions. Explain delays without blaming a coworker. If you damage something or make an error, stop the affected work, protect people and property, notify the supervisor, and explain the facts through the company's response process.

Use the evidence loop

- State the finding: what did you observe or measure, under what conditions?
- Explain the meaning: compare the evidence with the applicable equipment instructions or verified specification.
- Connect the concern: describe how the finding may relate to the customer's complaint; identify what is not yet established.
- Name the next step: explain further testing or appropriate choices, then check understanding.

Say: "The earlier repair is in the record, but that does not establish today's cause. I need to check the current conditions before I recommend the next step."

Keep permission and safety explicit

Diagnostic permission is not repair approval. Confirm scope, total, exclusions, and authorization before work. Obtain new approval for changes. Required safety measures are not optional upgrades.

For a suspected hazard, stop the affected task and follow the company's approved emergency and escalation procedure. Do not minimize urgency to sound reassuring, bypass a protective device, or operate equipment merely to complete a demonstration. Perform technical actions only within your training and authorization.

Do: Offer supported choices. One repair may be enough. Respect a declined optional item.

Document: Separate reports, observations, interpretation, and action. Record approvals and declined work neutrally.

Manager checks: Look for evidence and consent. “No additional issue found” is valid when accurate.

Practice a Difficult Arrival

Training scenario: A repeat problem and an unconfirmed part

This is an illustrative exercise, not a documented customer case. The customer has an afternoon commitment and is frustrated that cooling stopped again. You are running 20 minutes late. The previous invoice shows a component replacement six weeks ago, but contains no recorded post-repair measurements. Dispatch has written “same problem.” A possible replacement part appears in inventory, but compatibility and physical stock are not confirmed.

Your task

Work with a partner for a five-minute role-play. The technician has two minutes to prepare and three minutes to explain the approach. The customer asks, “You were just here. Can you replace the same part for free and finish before I leave?” Do not invent test results, warranty coverage, inventory, or completion times.

- Identify what the record proves and what still needs checking.
- Acknowledge the delay and the repeat concern without blaming the earlier technician.
- Explain the diagnostic and coverage-verification process; check the customer’s available time.
- Arrange a specific next update rather than promising completion.
- Record the next action, its owner, and the promised update time.

A workable response

“I’m sorry we’re late, and I understand why another cooling problem is frustrating. I see the earlier repair in the notes. I need to verify what is happening today and have the office confirm any coverage before I can answer the cost question. What time do you need to leave? I’ll update you before we agree to any additional work.”

Debrief the decision

The previous invoice confirms a repair, not its present condition or the cause of this failure. The missing readings are a documentation gap, not proof of poor work. Inventory is a lead to verify, not a promise. The customer’s schedule is a constraint to plan around, not a reason to skip testing.

Observer feedback: Quote one effective phrase and one change to practice

_____

_____

Check your judgment

Name _____ Date _____ Coach _____

Answer with the action you would take and why. Use the information provided; identify missing facts instead of making them up. Your instructor will review the reasoning as well as the answer.

1 The familiar failure

Two prior invoices show the same component replaced. The current complaint sounds similar. What can you conclude from the record, and what must you verify before recommending work?

_____

_____

2 The missing instrument

A required instrument is unavailable. A coworker says the symptom is obvious and suggests replacing the likely part. What do you do, and how do you explain the delay?

_____

_____

3 The incomplete approval

The customer agreed to the diagnostic charge. You find an additional repair that you can perform quickly. The customer says, “Do what you need to do,” but has not seen the scope or total price. What must happen before that repair?

_____

_____

4 The optional recommendation

The customer declines an optional improvement after you explain it. The primary authorized repair remains appropriate. How do you respond, document the decision, and decide whether to follow up?

_____

_____

5 The claim you cannot support

A teammate says, “This upgrade will prevent future breakdowns.” Rewrite the statement so it describes a supported benefit without a guarantee. What evidence would you need?

_____

_____

Take the standard into the field

Assignment: Apply RESET on five calls and review two with your manager.

For each call, record a specific action and evidence of its use. Use job references rather than customer personal details in this training record. Do not take photos or recordings outside the company's consent and privacy procedures.

Job and date	Readiness or judgment action	Evidence and next step
Training example	**History reviewed; warranty status not confirmed. Asked office to verify before discussing coverage.**	**Job note separates known repair fro current unknown. Office owns cover check; update promised at 2 PM.**
Call 1 _____	_____	_____
Call 2 _____	_____	_____
Call 3 _____	_____	_____
Call 4 _____	_____	_____
Call 5 _____	_____	_____

One improvement at a time

Completed coaching example: "You identified the missing coverage information correctly. You did not assign an update time. On the next three calls with unresolved information, name the owner and next contact time before leaving the conversation. We will review those notes Friday."

My improvement action and due date

_____

Manager observation and evidence

_____

Readiness check: History reviewed; tools and protection ready; unknowns identified; escalation route understood; next step explained without an unsupported promise.

Technician _____ Manager _____ Review date _____

Progress to Happy Hello when the technician demonstrates these behaviors consistently and the manager has addressed any unsafe action, unsupported claim, or authorization gap. Attendance alone does not establish readiness.