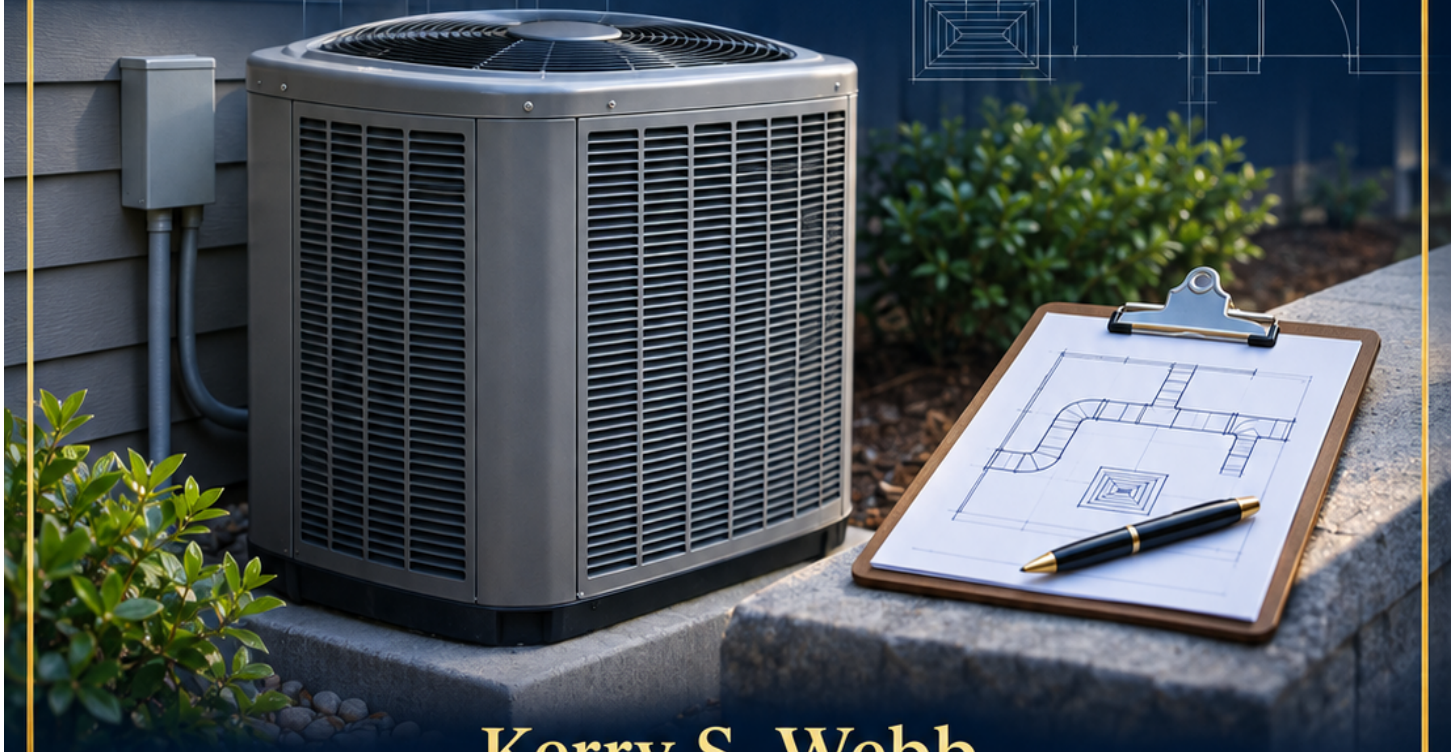
BGS CONTRACTOR GROWTH

THE HVAC SERVICE MANAGER PLAYBOOK™

4.0

20 Modules to Build a High-Performance, Scalable Service Department



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Use these 20 modules to build a consistent service management routine. Each lesson connects field examples with coaching conversations, scorecards, and practical exercises. Apply the actions in your department and review the results with your team.

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Module 1 Service Manager Identity

Outcome: Shift from dispatcher to performance leader.

Leading technician performance

Your job as a service manager is to improve the performance of your technicians. Filling the board, answering calls, and solving immediate problems are necessary parts of the day, but they can consume all your attention. When that happens, you spend your time reacting while the same performance gaps continue. The department stays busy without becoming more consistent or more profitable.

A performance leader prepares technicians to make better decisions before they reach the next customer. You set clear expectations, review results, and coach the behaviors behind those results. Each technician contributes to the department's production, and each call gives you an opportunity to improve service, communication, and revenue. Your success depends on helping the people in the field perform well.

This change in identity also changes how you respond to problems. Instead of becoming the person who supplies every answer, help technicians develop the judgment to work through a call. Clear standards reduce confusion, regular coaching develops capability, and consistent follow-up makes improvement part of the job. The technicians do the work that customers experience; your role is to help them do it better.

Putting the role into practice

Begin by defining what a successful day looks like. Set expectations for revenue per technician, memberships, and call quality. Review the previous day's results each morning so you can identify strong performance and decide where help is needed. A five- to ten-minute coaching conversation focused on one improvement is easier to apply than a long discussion covering everything at once.

Recognize good work publicly and address individual gaps privately. Use weekly scorecards to determine whether your coaching is producing progress over time. Daily numbers can move around, so look for trends before drawing conclusions about a technician's overall performance.

When you introduce this approach, tell the team, "Our goal isn't just to get through calls—it's to improve how we perform on every call." Follow that with a clear commitment: "I'm here to help you succeed, but we're going to hold a high standard." A useful daily question is, "Let's focus on one thing you can improve today."

Scenarios from the field

The busy board. It is 9:30 a.m., the board is full, and two technicians are behind schedule. One needs help diagnosing a low-refrigerant issue while another is asking about a replacement recommendation. If you take over every decision, you quickly become the bottleneck. Ask the technician to explain the findings and recommendation first. "What options did you present? Walk me through your process" keeps the conversation focused on judgment and customer outcomes.

The low average ticket. A technician runs four calls a day with a $420 average ticket, compared with the team's $780 average. Being personable does not explain or resolve that gap. Schedule a ride-along, observe the option presentation, and look for relevant needs the technician may be overlooking, such as indoor air quality, airflow, or maintenance. Use what you observe to guide the coaching rather than assuming the reason from the number alone.

The missed maintenance opportunity. A customer has a 12-year-old system, a dirty blower, and weak airflow. The technician replaces a capacitor and leaves without discussing the other findings. Review whether cleaning, a maintenance membership, or airflow correction should have been explained. Ask, "Let's walk through what else you could have offered." The point is to help the customer understand the system's condition and make an informed choice.

Scorecards and the daily management routine

Use the daily dashboard to see the gap between targets and actual results and record the action you will take. The weekly technician scorecard supports coaching, accountability, and compensation discussions by making performance visible.

Daily manager dashboard

KPI	Target	Actual	Gap	Action
Revenue / Tech	$2,000	$1,650	-$350	Coach options
Avg Ticket	$750	$610	-$140	Ride-along
Conversion Rate	65%	52%	-13%	Script training
Memberships	2/day	0	-2	Reinforce offering
Callbacks	<5%	8%	+3%	Quality review

Weekly technician scorecard

Tech	Avg Ticket	Conversion %	Memberships	Revenue	Callbacks	Grade
Mike	$820	68%	6	$9,200	2%	A
John	$540	49%	1	$6,100	7%	C
Alex	$710	61%	4	$8,400	3%	B

Start the morning with a 15-minute review of yesterday's numbers and identify the technicians who most need recognition or support. Check average-ticket pacing and memberships again at midday. If performance is below plan, contact the technician and coach the specific behavior that needs attention. At the end of the day, review what worked, what did not, and who needs help tomorrow.

When a technician calls unsure of the next step, ask, "What did you find, and what options did you give the customer?" When results are low, say, "You're doing solid work, but we're missing opportunities. Let's fix that together." Reinforce the purpose of the call with, "Your job isn't just to fix—it's to help the customer make the best decision."

Practice and application

Compare where you currently spend your time with the activities that actually improve revenue and service quality. Then choose one technician, identify one improvement area, and practice a five-minute coaching conversation. Review last week's numbers to identify both your strongest performer and your biggest coaching opportunity.

During a ride-along this week, evaluate communication, option presentation, and confidence, and identify two improvements. Review ten recent calls for relevant services that could have been explained but were missed. Build a daily coaching habit by recording the technician, the topic, and the result of each conversation.

Your action plan

Today, review yesterday's KPIs, set one clear expectation, and coach one technician who needs support. This week, begin daily performance reviews, implement technician scorecards, and conduct two ride-alongs. This month, establish a regular weekly performance meeting and use the daily routine to spend more of your time preparing the team for success.

Your leadership becomes more effective when you track the right numbers, coach the behaviors behind them, and maintain clear standards. Keep this reminder in front of you: "My job isn't to manage calls—it's to drive technician performance."

Module 2 KPI Mastery

Outcome: Know which activities and results drive revenue.

Making performance visible

A busy day can hide a weak result. Saying that the department “felt busy” or “should have done better” gives you little direction for the next morning. Key performance indicators, or KPIs, give you a way to describe what happened and decide what to do about it. Every call and every technician contributes information you can use.

Revenue depends on call volume, conversion, and the value of completed sales. When average ticket means revenue per converted call, the relationship is: revenue equals calls multiplied by conversion rate multiplied by average ticket. Revenue divided by all calls is revenue per call. Keep these definitions consistent so you do not count conversion twice or compare different measures as if they were the same.

The value of tracking comes from the action that follows. A low number tells you where to investigate; observation and discussion help you understand the behavior behind it. Use the data to focus your coaching instead of making a general request for better performance.

Scenarios from the field

Busy without enough revenue. The team runs 42 calls, converts 48 percent, and produces a $520 average ticket. Adding calls may not address the existing gaps. Review how technicians explain findings and present options so you can determine why both conversion and ticket size are low.

High conversion with low tickets. A 72 percent conversion rate paired with a $390 average ticket suggests that technicians may be obtaining approval for basic repairs without discussing other relevant solutions. Review the calls and say, “You’re great at closing—but we’re missing opportunities to fully solve problems.”

High tickets with low conversion. An average ticket of $950 with conversion at 38 percent calls for a different conversation. Check whether technicians are presenting only expensive solutions and omitting a suitable basic repair. Reinforce the full option-building process so the customer can choose among appropriate solutions.

Choosing the measures

Track daily revenue per technician, average ticket, conversion rate, and memberships. The playbook’s example daily targets are $1,800–$2,500 in revenue per technician, a $650–$900 average ticket, conversion of 60–75 percent, and one to two memberships per technician. Establish targets that fit your department and use the same definitions each day.

At the weekly review, examine revenue per technician, total department revenue, callback percentage, and lead close rate. The example callback target is below 5 percent. As your reporting improves, add revenue per call, indoor air quality attach rate, the repair-to-replacement ratio, and opportunity conversion rate. These additional

measures should help you answer a specific question, rather than create more reporting for its own sake.

Daily manager dashboard

KPI	Target	Actual	Status	Action
Calls Ran	40	38	Review	Improve dispatch
Revenue	$70K	$58K	No	Coaching needed
Avg Ticket	$750	$610	No	Options training
Conversion	65%	52%	No	Script coaching
Memberships	20	8	No	Reinforce offering

Weekly technician KPI tracker

Tech	Calls	Revenue	Avg Ticket	Conv %	Memberships	Grade
Mike	28	$22K	$785	68%	6	A
John	31	$15K	$480	50%	2	C
Alex	26	$19K	$730	63%	4	B

The dashboards are sample coaching tools. Set a consistent reporting period and reconcile the underlying call, revenue, and conversion definitions before using them for your own team.

Turning numbers into coaching

Each morning, review the previous day and identify the strongest and weakest results. Ask why they occurred. At midday, check whether the department is on pace, contact technicians who need help, and review whether customer service representatives are making outbound calls. The example operating target is more than 100 combined inbound and outbound calls daily; apply that target to the appropriate team and staffing level.

At the weekly meeting, review each technician and set an improvement target. Connect the number to an observed behavior. Low average ticket may point to incomplete options, while low conversion may point to unclear explanations. Confirm the cause before selecting the training.

For a low ticket, try, “You’re solving the problem, but we’re not giving the customer full options. Let’s fix that.” For low conversion, ask, “Walk me through how you’re explaining the issue to the customer.” If memberships are low, ask, “Are you offering it on every call—or only when it feels right?” Reinforce strong performance with, “You’re doing exactly what we want—let’s help others get there.”

Practice and application

Use yesterday's data to calculate revenue per call and conversion rate, then identify the largest gap. Select one technician, review the numbers, and coach one issue using the relevant script. Practice diagnosing a low-revenue day by determining whether the problem comes from call count, conversion, or ticket size.

For the missed-revenue exercise, compare a $500 revenue-per-call result with a $750 target. At four calls per day, that $250 gap represents $1,000 per day, or $5,000 over a five-day week. If you use average ticket per converted call instead, apply the conversion rate as well. This keeps the calculation tied to the way you define the metric.

Your action plan

Today, review yesterday's KPIs, identify one gap, and coach one technician. This week, implement daily tracking and hold one KPI review meeting. This month, establish technician scorecards and a dependable weekly review routine.

Numbers help you replace guessing with focused management, but they produce value only when you use them to improve the work. Keep the core reminder: "If we don't track it, we can't improve it."