

Analysis Summary
C&S Appliance Services Training
2/21/23

The Situation

- The business owner plans to sell and retire within one year and desires to reframe the business structure to be most profitable and marketable when that time comes.
- The Customer Service Representative logs work orders, assigns them to the Technician, and tracks completion of the work order.
- The Technician completes comparative cost analysis, diagnoses appliance problems, orders parts, repairs the appliance, and submits an expense report.
- After an appliance has been repaired, the company offers a 1-year warranty on parts and a 90-day guarantee on labor. The industry holds a 12% recall rate as an acceptable standard, but the company is currently at a consistent 25% recall rate. Repairs are being misdiagnosed, resulting in the high recall rate, significant loss of profit, and negative customer perception.
- Each technician is expected to charge a minimum of \$1000 of daily service using the company pricing guide; this measure has not been met in the last year.
- The business owner has invested in a new Customer Relationship Management (CRM) system that includes tools for scheduling, estimates and invoices, payments, internal company communications, a customer portal, customer feedback, customer personal information, website development, social media management, and online presence.

The Problem

- Employees do not have clearly written guidelines for expectations of conduct, performance, processes, and evaluations; thus, the recall rate is higher than acceptable, profits are lost, and company relationships are strained.
- Customer Service Representatives do not have clear information on services, products, zones, pricing, and systems to effectively communicate with customers.
- Technicians have not been trained in comparative cost presentation, level 2 repair diagnosis, time management, or effective communication.
- Employees are not familiar with the features of the new CRM or how to complete company processes within the system.
- Customers did not have access to a client portal in the previous system used by the company. The new CRM will allow customers to schedule service, a practice the employees will need to anticipate to maximize time management.
- The company has limited online presence and a minimal marketing strategy.

Current Training

- Customer Service Representatives receive about 3 hours of new hire training, which includes basic instruction on answering customer calls and completing work orders. This training has been unfocused and intermittent, resulting in the need to call technicians for answers to basic company questions before returning customer calls, some of which result in missed service opportunities.
- New Technicians complete 80 hours of self-paced online training through Master Samurai Tech Academy on Core Appliance Repair. A certification can be acquired by the technician but is currently not required. After completing the first required units, new technicians receive on-the-job training from an experienced technician for one month.
- MSTA training covers basic appliance functionality and diagnosing basic problems.
- Experienced technicians receive communications about changes needed in processes; there is no organized training.

Proposed Solution

- **Business Needs –**
 - 1. Train all current and future employees in specific company policies.**
 - Mission & Values will be incorporated into each.
 - Communication with the Customer and Customer Satisfaction.
 - Need for thorough diagnoses and comparative cost analysis.
 - Evaluation and Professional Development – performance reviews, training opportunities, special opportunities for CFC, refrigerators, EPA certification 608 Type 1.
 - Create forms to easily evaluate employee performance.
 - Compensation and Expenses– payroll schedule, bonuses/merit pay, company vehicle/phone/laptop, insurance, tools, misdiagnosis fees.
 - 2. Train all current employees to use the new CRM.**
 - Hands-on interaction (either ILT or VILT); during training, technicians will use their field device. Customer service representatives will use the laptop.
 - Downloading apps on laptop and field devices (phone or tablet).
 - Organizing employee account: information, icons.
 - Calendar use, scheduling service calls, differences from previous system, time management.
 - Entering customer/client information, including property management clients.
 - Creating estimates with emphasis on comparative cost analysis.
 - Generating invoices and taking payments.
 - 3. Redesign website for SEO optimization.**
 - Focus on branded visual appeal, user experience, and call to action.
 - Write content pages for customer engagement.
 - Develop videos on company processes and client portal.
 - 4. Increase customer engagement.**
 - Develop marketing videos on client portal and company service.

- Write content for social media posts.
- Respond to customer feedback.
- 5. Organize training for the longevity of the business.**
 - Purchase an LMS and develop courses with software simulations for new employees to limit time constraints and reduce the need to take supervisors from regular duties.
 - If the company decides not to purchase an LMS, video-based training could be used as an alternative.
 - Create folders with on-the-job resources to be shared for new hires according to their role.
 - Create training calendars for new technicians to complete modules in MSTa. Require certification to increase company credibility and employee commitment.
- **Customer Service Representative Needs** – Provide more complete job aids for reference while answering customer calls, including the following:
 - 1. Call Script** - including customer interaction, types of services, brands serviced, invoice guide, and warranty information.
 - 2. Internal Office Document** - all needed office accounts log in information.
 - 3. Map of Zone Limits** - exact lines of locations that will be serviced in each zone.
 - 4. Client Portal Reference Sheet.**
- **Technician Needs** – Provide a job aid for the work order process and diagnosis processes for each appliance type. Add training on loss prevention.
 - 1. Pocket Reference Guide** - Job aid will act as a checklist for each work order. A physical printed guide and a digital version will be supplied to each technician. It will include the following components:
 - Prework
 - Work Order Process
 - Refrigerators and Freezers
 - Washing Machines
 - Dryers
 - Dishwashers
 - Ranges
 - 2. Loss Prevention Training** –
 - Engaging and interactive
 - Themes will include:
 - Providing quality service through accurate cost calculations based on thorough diagnoses.
 - Effective communication to increase customer understanding and satisfaction with transparent costs.
 - Decreasing recall rates through recognizing how recalls affect profit margins, customer retention, and time spent on a work order.
 - Components may include:

- Practice scenarios selecting quality responses, completing comparative cost calculations, and explaining costs to customers.
- Videos or other microlearning on processes.
- Digital modules that are self-paced with final assessment.
- Evaluation of service calls and identifying strengths and weaknesses.
- Review of job aids and pocket reference guide.

Timeline

- 7 months depending on the company's decision regarding purchase of LMS and each proposed solution.