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**QSC Catalyst 2025 Service Performance Roundtable Summary**

**New Orleans, Louisiana**

1. **As business owners striving to enhance your customer experience, how do you currently prioritize, identify and qualify the interpersonal skills necessary for potential employees to ensure you hire the right candidates the first time, ensuring a "good fit" for the company, the customer and the employee? What works well for you?**

* Test Drive Day, or if brand new apprentice or tech, ride along
* Emotional Intelligence Questions
  + Use DISC test, Wonderlic
  + Use phone interviews for screening
  + FBI – Face Book Investigation
  + Be late for the interview yourself on purpose so the candidate must chat with office staff while their guard is down
  + Multiple Team Members interview 3/3
  + When interviewing; analyze their listening skills, do they make eye contact, find out if they did any research on your company, try interviewing during the morning chaos, craft questions about their character, find out what they liked and disliked in prior positions, do they have hobbies outside of work they are passionate about, have an interview scoring system,
  + When considering employees, check references, and ask people at supply houses or others that might know the person
  + Look for Core Value and Culture fit and alignment
  + Hire for attitude, aptitude, personality, gauge level of empathy, teach the skills
  + After hiring someone, do frequent check-ins during the first year, for example, 30 days, 60 days, 90 days, 6 months, and 1 year.
  + Ask the candidate if they had $2,000 and 4 days off, what would they do?
  + Do not retain the wrong employees after you’ve done all the training you can do
  + Be able to effectively sell your commission or hourly rate plan and the whole package including the benefits

1. **How do you keep score at your business and what numbers do you share with your team? What KPI’s do you look at daily, weekly, monthly and yearly?** 
   * KPI Scorecards for techs and CSRs reviewed monthly with bonuses paid for good performances
   * Put the sales results up digitally somewhere in the office where everyone can see them daily, and even review with techs daily if only for a few minutes
   * Make sure the Service Manager and Dispatch are aware of the revenue budget requirements
   * Track KPIs in Service Titan very early in the month so adjustments can be made
   * KPIs mentioned to track include: call backs, reviews, gross margin, average ticket, tech conversion rate, safety checkup, gross sales, pictures, average billable hour, P&L reviewed by all leadership quarterly and whole company yearly, marketing effectiveness, number of new customers each month, cancelled calls, call booking rates, listen to call recordings, driving record, service agreement sales, number of sales leads, options given on each call
   * Share numbers monthly with the office, yearly with field, sharing percentages of sales only with those that do not have need-to-know dollar amounts.
   * Weekly – tech debriefs, tech check-ins, payment collection, VIPs sold, attendance. Monthly – Revenue, billable efficiency, closing rate, memberships, call backs. Annual – all employees see the end of year results of these KPI’s as well as actual versus budgeted and overall profitability. End of year bonus if goals were met.
2. **Many service contractors no longer truly offer regular after-hours or weekend service, and this is at a time when customers are accustomed to fast, often immediate satisfaction. What are some of the best practices for managing customer expectations and enhancing satisfaction with your company?**
   * Ask the customer when you would like the service, or would you like to know what my first available appointment time is?
   * CSR or Admin on call weekly, set ETA expectations early
   * Can do 24/7 with proper prioritization of calls
   * Have dispatchers rotate on taking calls, promise 30 minute or less response times
   * If you are not open after hours, at least use an answering service or technology like AI to capture calls, 24/7 virtual assistant, make sure you can still book appointments for regular times when the call comes in after hours
   * To keep techs happy, paid Friday off after a week of on call
   * Take the call but charge a much higher dispatch fee and communicate exactly how it will work, majority of fee goes to the tech on call. Also, you can consider charging a higher price for jobs after hours. (Customers will often pay for convenience)
   * Remember when it comes to after hours, under promise and over deliver.
   * If you sell memberships, offer them priority service. Limit after hours service to members only.
   * See if you can get some techs to work Tuesday through Saturday.
   * Have a place on your website where a customer can request a quote at any time of day
   * Determine exactly which customer types are priority and handle those as fast as possible
   * Utilize video calls to help customers save you and them time and money
   * Advertise and follow through with pro customer promises such as 2-hour time window guaranteed
   * Have Field Service Managers take calls after hours instead of the tech on call
   * Follow up after any service performed to make sure the customer is satisfied
3. **Leadership is exhausting and burn out is real. What can we do to stay engaged and raise our level of energy?**
   * Stay involved in your hobbies, listen to podcasts for inspiration,
   * Build your bench strength so you can delegate things to others that are accountable
   * Exercise, walk, run, meditate, read, take care of physical and mental health, get enough sleep, eat right
   * Prioritize your to-do list, make sure personal care is part of your schedule
   * Celebrating wins, having fun outings and events
   * Be honest with yourself, don’t hide the burnout, so other people know you need extra help
   * When you are away from the office, be away by setting communication boundaries.
   * Don’t forget about your own professional development
   * Terminate problem employees after documenting issues
   * Try switching up your usual routine
   * Attend QSC events to recharge your batteries
   * Focus on your high value tasks
   * Work with a Business Coach – Sometimes an outside perspective helps clarify your direction and reduce stress.
   * Talk often to Other Business Owners in your QSC Peer Group – You’re not alone—connecting with peers who understand your challenges can be refreshing.
   * Reconnect with Your Why – Remember why you started the business in the first place.
   * Mentor Others – Helping employees grow into leadership roles can be fulfilling and ease your workload.