



Manual 2

RESIDENTIAL

Dispatcher

OPERATING

MANUAL

CONTENTS

INTRODUCTION

1. DISPATCH START - MORNING RESPONSIBILITIES
2. CHECK AFTER-HOUR MESSAGES AND EMAIL
3. LAST MINUTE CANCELLATIONS
4. DAILY MONITORING OF RUNS AND TECHNICIANS
5. CONTRACT SALES / HOME BUILDERS
6. INVOICING
7. ONBOARDING OF NEW EMPLOYEES
8. CUSTOMER COMPLAINTS
9. SCHEDULING AND GENERAL TASKS
10. FROM RD TO RTs
11. TRUCK / FLEET MANAGER COMMUNICATION
12. CHECKLIST BEFORE LEAVING FOR THE DAY

RD: Residential Dispatcher
RT: Residential Technician
ROM Residential Operation Manager

RSM Residential Sales Manager
RSR: Residential Sales Rep
RTT: Residential Technician Training

INTRODUCTION

“ iOS and Android are what’s keeping the hardware and its apps working. If it is corrupted, the device stops functioning altogether. ” - **Apple and Samsung**

“The dispatcher holds the vehicles, the technicians and the homeowners together. It is the heartbeat of our operation. A malfunctioning heart grinds the body down to a stop.”
- **Power Vac/National Duct**

In the world of field service, the dispatcher is the central player, expertly bringing together different parts to make everything run smoothly. He/She knows when technicians start, how long they travel, and where the vehicles are. The dispatcher keeps customers happy by giving them updates on technician arrivals and making sure communication between the Company and homeowners is clear and concise. He/she also pays close attention to quality control to make sure every service meets high standards. Overall, the dispatcher is a key player in creating a well-organized and customer-friendly field service system. Dispatching done well optimizes resources, reduces costs, satisfies customers, and enhances the overall financial health of the business.

The Residential Dispatcher (RD) is solely responsible for keeping our residential fleet rolling smoothly 24/7. He/she communicates with RTs to ensure that they are on schedule and on time. The RD will monitor situations in real-time by phone, using the scheduling software, ServiceBox, and mapping software, Ramtracking. By knowing the exact locations of every vehicle, he or she strives to optimize routes taken by our fleet of trucks/vans in real-time.

Since at least half our staff do not report physically to the Cambridge location, we must monitor start times for all service technicians. This must be done first thing every morning when the RD arrives at his or her desk.

- I.1 This manual outlines in detail what the RD is expected to accomplish in the course of his/her workday. These are not recommendations, suggestions or opinions. They are operating procedures that the RD is required to follow to the letter. The wisdom of these procedures comes from years of success and failure. We have no time to reinvent the wheel but are always open to improving it.

- I.2 While the Company understands that some of the instructions may be missed in the daily grind, any omission should be exceptional rather than chronic. We are a dynamic company in a dynamic industry. This OM is a live document that should evolve on a timely base. If anything in this OM is obsolete, wrong, irrelevant or redundant, it should be brought to the supervisor's attention. The supervisor will gladly change the OM if the RD's recommendation is positively reviewed. Until the OM is updated, the RD should follow it as it is.

- I.3 It is understood that not every situation requires the RD to follow all the steps listed in this OM. Some of the procedures just do not apply on a given day, situation or time. The Company is making it clear that steps may be skipped because they do not apply, NOT because the RD deems them unnecessary. When in doubt, ask the supervisor for permission, not forgiveness.

1. DISPATCH START - MORNING RESPONSIBILITIES

- 1.1** Ensure timely monitoring of start times for all service technicians, given that half the staff is not based at the Cambridge location. All the following tasks are to be repeated every morning.
- 1.2 Attendance Verification**
 - 1.2.1 Check Clock Shark at 7:30 am to confirm employee check-ins.
 - 1.2.2 Validate the attendance of each employee.
 - 1.2.3 Examine the Time Clock for attendance records of Cambridge technicians.
 - 1.2.4 Communicate with the ROM regarding any attendance issues.
- 1.3 Late Employee Protocol**
 - 1.3.1 If an employee is more than 10 minutes late, the RD calls him/her on the cell phone to inquire.
 - 1.3.2 Inform the ROM about the late employee(s). The ROM will follow up from that point on.
- 1.4 Truck and Service Call Monitoring**
 - 1.4.1 Check the RAM tracker to ensure assigned vehicles are en route to their first service call.
 - 1.4.2 Verify that technicians have taken the correct assigned vehicles.
 - 1.4.3 Ensure technicians arrive at their first service call between 8:00 am and 8:30 am.
 - 1.4.4 If delayed due to traffic, advise the customer accordingly.
- 1.5 Unauthorized Stops and Route Monitoring**
 - 1.5.1 Monitor for unauthorized stops during the technician's journey to the first call.
 - 1.5.2 Clarify that morning coffee stops should be on the technician's time and done before clocking in.
 - 1.5.3 Be vigilant for technicians taking indirect routes or deviating from their designated path at all times. Call to enquire if it looks "unusual".
 - 1.5.4 Notify the ROM if the technician becomes hostile. We need to get to the bottom of each incident, it is however not the RD's job.

1.6 Review the previous day's clock-out time

Check the previous day's clock-out for employees on Clock Shark and Time Clock to make sure that each employee has clocked out. If the employee did not clock out, Clock Shark will automatically clock them out and apply 23 hours of service time. This could be costly to the company if payroll does not catch it later. RD should nip it in the bud at the source. While it is the RT's fault, the Company prefers not to overpay and then claw back causing disruption.

1.7 Check technician TO DOs

Check Todo in the Service Box for technicians making requests for supplies or vehicle maintenance. The notification if done properly should go to the Fleet Manager for fulfillment. This is a cross-check to cover for the Fleet Manager's omission, if any.

1.8 Since the technician may still be on the clock when the RD leaves for the day, make sure that the technician's last call from the previous day was completed and invoiced.

2. CHECK AFTER-HOUR MESSAGES AND EMAIL

2.1 After the RD has completed the morning check, check inbox email for any scheduling changes that may affect the current day's scheduling.

2.2 Check voicemail for messages that might affect the current day's scheduling.

2.3 If any messages will affect the current day run, come up with a plan to replace a cancelled job. We need 3 jobs per day as the bare minimum. If the cancellation is an 8 AM appointment, advise the technician and work on avoiding having a technician sitting idle for the second appointment of the day.

3. LAST MINUTE CANCELLATIONS

- 3.1 If the RD takes a cancellation from a customer and it is at the last minute, remind the customer that we require 48 hours notice for calculations or schedule changes. Advise him/her that last-minute cancellations are very disruptive to our scheduling. It means that the technician may have to sit idle for several hours in his truck. Many customers wait for scheduled appointments and this spot could have been taken by someone else if we had 48 hours notice. This speech may not work every time. If the RD can talk one homeowner out of ten to reconsider, it is a win.
- 3.2 Rebook the appointment if we can not convince them to keep the original scheduled appointment.
- 3.3 If they do not rebook, advise the customer that there will be a \$75 truck charge to cover our losses. This is clearly stated in the appointment reminder sent to the customer.
- 3.4 The \$75 truck charge applies to cancellations at the door as well.
- 3.5 A politely worded Form 14 will be mailed to the customer. The goal is not to collect the \$75 but to convince the customer to rebook. Again one out of ten would be a win.
- 3.6 If the last-minute cancellation is an 8 am appointment scheduled for that morning:
 - 3.5.1 Advise the technician of the schedule change and ask him/her to pull off to the side of the road.
 - 3.5.2 The dispatcher is in charge of the situation and is responsible for calling the next scheduled customer to pull the appointment ahead or replacing the job with a new job.
 - 3.5.3 Asking the technician to wait for the next job at the previously scheduled time is the easy and yet the **LAST** solution.

4. DAILY MONITORING OF RUNS AND TECHNICIANS

- 4.1** It is the responsibility of the RD to know at all times where all the RTs and all the vehicles are.
- 4.2** It is the responsibility of the RD to monitor the arrival and finishing times of RT at every job. Advise the ROM if there is a pattern of any given RT taking a longer time to complete cleanings.
- 4.3** If a RT is running behind schedule, it is the responsibility of the RD to reach out to him/her to inquire about the finishing time.
- 4.4** If the RT is running more than 45 minutes late, the RD must call and advise the next scheduled customer.
- 4.5** If the RT is running ahead of schedule, it is the responsibility of the RD to call and advise the next scheduled customer so that he/she will be ready for us.
- 4.6** Arriving earlier
 - 4.6.1** It is not acceptable to have a RT sitting idle in a parking lot to pass the time until the next call. The RD must make every effort possible to bring scheduled work forward to avoid idle time.
 - 4.6.2** Should the next scheduled homeowner sternly refuse to advance his/her appointment, the RT should be instructed to wait in the homeowner's driveway. This approach may compel the homeowner to let us in earlier.
 - 4.6.3** At no time, a RT should be allowed to "go have a coffee" and come back at the scheduled time.
- 4.7** At no time should the RT dispatch his/her route. The RT is not allowed to make contact with the homeowner to move set times or reschedule appointments. Any route or schedule changes must be done through the RD.
- 4.8** The RD must monitor invoice completion for RT and do spot checks for accuracy.
- 4.9** The RD must monitor RDs and vehicles for unauthorized stops during the day. Bring any concerns to the ROMs and VP.

5. CONTRACT SALES / HOME BUILDERS

- 5.1** It is the responsibility of the RD to schedule runs with home builders and contract sales.
- 5.2** The RD has to reach out to home builders/site supervisors to confirm appointments. Confirmation of appointments must be done within 48 hours of the scheduled time via a telephone call. Some builders book work 1 month in advance and a lot can change on a job site that could push our schedule back.
- 5.3** The RD must ensure that the address is exact and that no other duplicate addresses exist in the Servicebox app.
- 5.4** The correct PO must be listed on the invoice if the customer works with PO numbers.
- 5.5** Because builders put up new subdivisions, it is the responsibility of the dispatcher to know where the development is located. Most builders will provide maps.

6. INVOICING

- 6.1** It is the responsibility of the RD to make sure that all technicians are completing invoices according to Company requirements.
- 6.2** The RD has to make sure that RTs are
 - 6.2.1 updating the quote/initial invoice according to the final vent count and add-on services.
 - 6.2.2 preparing the invoices, collecting payments for our services
 - 6.2.3. emailing a copy of the invoice to the customer.
- 6.4** If RTs are not completing their invoices as above, the ROM needs to be advised.
- 6.5** The RD will check the accuracy of builder invoices before emailing them out.

- 6.6** The RD must reconcile all invoices to payments. All RTs must process all payments against invoices on the job site except for 3rd party invoices. RTs not following payment guidelines should be reported to their ROM.
- 6.7** The RD should prepare the sales report from the previous day and submit copies of all invoices to accounting. These reports could be done in Servicebox. If RTs are completing their invoices as they should, this task could be done quickly.
- 6.8** Each scheduled appointment must have a corresponding completed invoice. If the previous day had 34 scheduled appointments, then the Sales Report for that day should show 34 invoices.

7. ONBOARDING OF NEW EMPLOYEES

- 7.1** It is the responsibility of the RD to make sure that a new RT is set up in the Servicebox as soon as he/she comes on board.
- 7.2** The RD is responsible for ensuring that the new RT knows how to
- use Servicebox.
 - use the Enroute notification
 - update a quote
 - invoice the customer,
 - collect payment from the customer
 - apply the payment to the invoice
- This can be done in person, on the phone or through a Zoom call.
- 7.3** It is the responsibility of the RD to make sure that the RT has a working POS machine and knows how to use it.

8. CUSTOMER COMPLAINTS

- 8.1** The RD is the first level escalation for customer complaints and property damage.
- 8.2** The dispatcher will resolve complaints as quickly as possible depending on the circumstance. It is not acceptable to leave the customer waiting for a response longer than 24 hours.
- 8.3** Complaints by email should be returned the same day. It is unacceptable to ignore or avoid customer complaints, no matter how unpleasant they are. Every complaint deserves closure.
- 8.4** Get permission from the VP if the solution to settle a complaint costs more than \$75.
- 8.5** The ROM has to be notified via email of the complaint and its settlement so it can be recorded in the employee file.
- 8.6** ROM should be involved in inspection and damage. It is crucial for a quick resolution to any customer complaint.
- 8.7** The RD should follow up immediately if the ROM or a RT has done a return inspection or re-clean.
- 8.8** The RSM will be the 2nd level escalation for customer complaints if the RD is away from the office.
- 8.9** Notify the ROM if a technician is speeding, driving recklessly or is the subject of a complaint about unsafe driving behaviour.
- 8.10** The RD must document any complaints about the quality of work completed. These notes should be written directly on the work order.

9. SCHEDULING AND GENERAL TASKS

The dispatcher is responsible to ensure the following:

- 9.1** That we have the required manpower to deliver what is scheduled on the board.
- 9.2** That we have the correct number of vehicles to deliver scheduled services.
- 9.3** The work on the board is realistic and the RT is capable of delivering the service.
- 9.4** The RTs do not have holes (unscheduled - empty time slots) in their schedule.
- 9.5** There is no duplication of work on the board.
- 9.6** There is no zig-zagging across town. Work to be scheduled to minimize driving time for the RT. Avoidable driving is a huge financial drain on the Company.
- 9.7** There are no date conflicts between what is on the board and what is on paper.
- 9.8** There are no time slot duplications for the RTs.
- 9.9** If problems emerge, they need to be mitigated right away. It is not acceptable to advise the customer on the day of the set appointment. The RD shall deal with the issue before leaving for the day, not the next morning.
- 9.10** It is the responsibility of the RD to call customers if there is a sick call and we are unable to honour the appointment. This must be done first thing in the morning.
- 9.11** It is the responsibility of the RD to cancel or switch scheduled work and contact the customer with alternative scheduling dates. This should be done by phone first. If the customer does not answer the phone then email will be the backup method of notification. The RD should leave a voicemail to show that we have called. It is not acceptable to renege an appointment with a simple email or text.
- 9.12** It is the responsibility of the RD to make sure that all the RTs have a minimum of 3 jobs a day. If this condition is not met, the RD should make outgoing calls to move up work to meet this requirement.

- 9.13** If the RD can not meet the 3-job minimum for a run, the RD should reschedule the run or combine the route with another route and put the RT on a Pre-paid day off per Employee Handbook, Section IV, B-Policy #2.
- 9.14** When inputting work orders in Servicebox, the RD must look up the address on Google Maps to make sure that there is proper parking for our service vehicle.
- 9.15** The RD must call the customer the day before to remind him/her of the appointment if the job was booked more than 4 days in advance. The RD can leave a voicemail if nobody answers. This decreases the odds of last-minute cancellations.

10. FROM RD TO RTs

- 10.1** The RD does not have the authority to give requested days off to RTs. The RT must fill out Form 15 for the requested time off and submit it to his/her ROM.
- 10.2:** The RD is not the “boss” of RTs He/she is however empowered to give RTs instructions on where to go and when to go. He/she will treat every RT with respect and firmness.
- 10.3** If a RT stops cooperating, ignores legitimate instruction, exhibits behaviour that is confrontational, or uses abusive language, the RD will refer the situation to the RT's ROM.
- 10.4** Upon investigation, the ROM may impose disciplinary measures in accordance with the provisions of the Employee Handbook. Abusive behaviours towards the RD will not be accepted or ignored. They will be dealt with rigorously every time.

11. TRUCK / FLEET MANAGER COMMUNICATION

- 11.1** The RD is responsible for calling tow trucks when necessary.
- 11.2** The RD must advise the fleet manager of any vehicle necessitating maintenance or/and repair
- 11.3** Truck availability will be provided by the Fleet Manager through a daily report by email.
- 11.4** The RD is responsible for assigning vehicles to RTs.

12. CHECKLIST BEFORE LEAVING FOR THE DAY

- 12.1** Any scheduling changes must be communicated to the customer by phone. If not answering, then, leave a voicemail and send an email. Document it in the customer notes.
- 12.2** Make sure that what is on the board is what we have in the information slips.
- 12.3** Make sure that the RT is capable of completing the scheduled work and that there are no conflicts. We have to avoid cancelling jobs on appointment day at all costs.
- 12.4** The RD must check Ramtracking to ensure that all RTs are at their last job. If not, call the customer to advise that the RT is running behind while avoiding rescheduling. The sales team should not have to look after this kind of issue after the RD has left for the day
- 12.5** Check email and make sure that important emails have been attended to.
- 12.6** Vehicle assignments have been completed and updated in Servicebox.
- 12.7** Assigned start times have been posted to Servicebox.