



Manual 4

RESIDENTIAL

OPERATION

MANAGERS'

OPERATING

MANUAL

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RD: Residential Dispatcher
RT: Residential Technician
ROM Residential Operation Manager
RSM Residential Sales Manager
RSR: Residential Sales Rep

RTT: Residential Technician Training

1. THE COVENANT

“Trust, But Verify”. - Ronald Reagan, US President

He meant: I will never trust you.

“Only Trust Those You Can Monitor”. - Dan Zhou, Power Vac Ontario

He meant: Trust is too complicated, I have managers.

- 1.1 This manual outlines in detail what the ROMs are expected to accomplish in the course of his/her workday. These are not recommendations, suggestions or opinions. They are operating procedures that all ROMs are required to follow to the letter. The wisdom of these policies is built from years of learning. We have no time to reinvent the wheel but are always be open to improving it.
- 1.2 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. The 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 If anything in this OM is obsolete, wrong, irrelevant or redundant, it should be brought to Dan’s attention. It will be put on the agenda at the next management meeting for all team members to comment on and Dan will update the OM after resolution. The maximum amount of time a contested instruction remains in the OM will be one month. In other words, if it is in the OM, then ROMs should follow it. In extreme cases, the ROM may obtain temporary relief from Darwyn/Dan until the next management meeting.
- 1.3 This is the equivalent of procedures a technician needs to follow to clean a house for ROMs. ROMs have wide latitude to manage the operations of the Company. However, if an issue finds its way into the OM, then, that latitude disappears ... completely. After years of failures, losses and regrets, the Company has zero tolerance for non-compliance. If a ROM cannot change the OM after a spirit

discussion, then he/she has to follow the instructions of the OM in its entirety.

- 1.4 The US President swears an oath to the American constitution, the Canadian Prime Minister affirms allegiance to the Queen/King, Power Vac Ontario's ROMs are committed to following the instructions of the OMs as the basis of their employment with the Company. Every one of them is expected to know this document inside out within a week of his/her appointment to the position.

2. HIRING

- 2.1 The need for new personnel may be raised by different people in the organization in formal or informal settings. Before the Vice President gives the final go-ahead, the ROM in whose territory the new hire will work should be consulted and allowed to comment. When the hiring process starts, the ROM should be fully aware and prepared to welcome the new hire(s).
- 2.2 For practical reasons, the posting of the job, the reviewing of the resumes, the booking of interviews, the interviews themselves, and the final hiring decision may be conducted by the ROM or someone else in the organization.
- 2.3 When a candidate is deemed suitable, his contacts should be forwarded to the ROM immediately. The ROM will then reach out to the candidate to offer the position and agree on a starting date.
- 2.4 It is the ROM's responsibility to inform
 - 2.4.1 the RD and put the recruit in a suitable vehicle on his/her first day.
 - 2.4.2 the appointment booker to take down the wanted ad and cease booking new interviews.
- 2.5 Before the new hire's first day, the ROM should send him/her a standard offer letter by email so that the Company has a record of the candidate accepting the position.
- 2.6 Along with the offer letter, the ROM shall send to the new hire the link with which he/she can start the process of reviewing the Employee Handbook and provide various employment-related documents on the Company portal.
- 2.7 If the new employee does not show up on day one, the ROM should inform the interview booker immediately so that the wanted ad could be put back up or/and back up candidates could be contacted.

3. ON-BOARDING

- 3.1 The ROM is the primary contact for the new hire. Once the interviewer hands the chosen candidate's contacts to the ROM, the new hire becomes the ROM's exclusive responsibility. The first thing the ROM should do is exchange cell numbers and email addresses with the new hire. The new hire should be advised that he/she is welcome to contact the ROM during business hours for any matter and 24/7 for urgent matters.
- 3.2 History has shown that when a new hire takes a longer time to start under the pretense of giving notice to the current employer, he/she increases the odds of getting a counteroffer or interview for another job. It is therefore the ROM's responsibility to pressure the new hire to start as soon as possible.
- 3.3 Before the new hire sets foot in our office or satellite parking lot, the ROM should walk the new hire through the steps from what to expect on the first day all the way to when he/she would go solo.
- 3.4 The ROM should make sure with the RD that the new hire is paired up with a senior tech/trainer on his/her first day, and Clock Shark installed on his/her smart phone. Any misunderstanding gives the new hire the first impression of a Company that is disorganized and unprofessional.
- 3.5 The ROM has to greet the new hire at the start of the shift on his/her first day in person or by phone. The new hire should not have to fend for himself/herself in a new environment. He/she should be introduced to the trainer by the ROM.
- 3.6 All technicians' paperwork is centrally stored in Cambridge. If the ROM collects them in the field, he/she should file them immediately into the technicians' HR file when coming back to the office. ROMs should not keep technician-related documents at their home office.

4. TRAINING

- 4.1 Training is one of the top responsibilities of the ROM. Good training not only builds the foundation of quality work in the future but also keeps the recruit from quitting prematurely. Training is not flipping the recruit to a trainer and forgetting about it. The ROM owns the training process, he/she is the real trainer.
- 4.2 If the ROM is away, training for new hires should be delayed because the ROM is the main actor in the training process. Without the ROM present, there is no point to go forward. The half an hour interview is just a meet and greet. Training is the real interview.
- 4.3 The ROM must talk to the recruit at the end of his/her first day of work, and a few times a week after that.
- 4.4 When the training is complete, the ROM must meet with the recruit face-to-face and satisfy himself /herself that the new hire is ready. The ROM is the final signoff in Manual 7 before the newly minted technician could go solo.
- 4.5 If during the training, the recruit exhibits behaviours that are considered red flags such as repeated lateness, awol, insubordination, dishonesty, aggressivity, bad driving and inability to learn, the ROM along with the trainer should talk to Darwyn about cutting our losses. When we see such behaviours so early in a recruit's tenure, it could only get worse. While we have invested money and time on that recruit, let's nevertheless not throw good money after bad and do the courageous thing by parting ways immediately. We can improve someone's skills, but we cannot change a person's character.
- 4.6 When a trainee is terminated or quit, the ROM should contact immediately any leftover candidates from the previous recruiting session. If there is none, the ROM needs to make sure that a new round of recruitment starts right away.
- 4.7 Emulating the concept of lifelong learning and continuous education, ROMs are

expected to be mentors once a trainee becomes a permanent technician, calling it “perpetual training”. Since technicians work alone, they need someone to talk to but may not initiate contact by themselves. ROMs are expected to give advice, provide feedback and be that person. A mentor could make a big difference in attendance, performance and retention. ROMs play that role for all their direct reports.

5. REMOTE SUPERVISION

- 5.1 Besides training, the ROM’s main task is to keep the wheels spinning in the field. To this end, the work is repetitive because our technicians do repetitive work. Since our technicians are all at different places during the day, the ROM needs to follow them using electronic tools rather than in person.
- 5.2 ServiceBox tells the ROM where the technicians are supposed to be, Ramtracking tells the ROM where the technicians are and the smartphone allows the ROM to continuously communicate with the technicians.
- 5.3 We expect ROM to have Ramtacking and ServiceBox running in the background continuously, a desktop indoors and a car-mounted laptop in the field.
- 5.4 The ROM is looking for irregularities in the following areas:
 - 5.4.1 Starting time after the usual 7:30 AM
 - 5.4.2 Any unusual stopover during the day
 - 5.4.3 Unusual driving trajectory from one house to another
 - 5.4.4 Time spent in each house cleaned
 - 5.4.5 Driving speed
- 5.5 Besides the real-time monitoring, the ROM should produce a daily activity report, Form 18, before noon on the cleaning and driving time of each technician from the previous day using data from Ramtracking.
- 5.6 The ROM is expected to contact technicians immediately through text, email or voice each time he/she sees anything unusual. This is an essential repetitive task to remind technicians that we are watching
- 5.7 In the unlikely case that a technician does not receive any enquiry, the ROM should still talk to or call him/her once a week just to “check in” at work or at home. This is consistent with the Company’s policy of “engagement”.

- 5.8 All technician enquiries should be returned within 2 business days by the ROM. The ROM sticks to facts and gives short answers using bland language. Even if some questions are redundant and have been answered before, the ROM tries to respond. If the RT becomes argumentative, rants or otherwise unreasonable, then, the ROM stops engaging. RTs lose the privilege to a response when he/she uses abusive oral or written language. No “email/text pissing match”. The ROM only writes what he/she is comfortable to show it to the world.

6. ONSITE VISITS

- 6.1 The ROM should inspect every technician a minimum of 3 times a month
- 6.2 Inspection will look at
- 6.2.1 Quality of duct cleaning
 - 6.2.2 Customer interaction
 - 6.2.3 Compliance in presenting addons
 - 6.2.4 Stickers on the furnace and
 - 6.2.5 Yard signs planted on the homeowner’s lawn
- 6.3 Inspections are performed by the ROM randomly unannounced, and results are shared with the technicians
- 6.3.1 No deficiency is a badge of honour
 - 6.3.2 Minor deficiency will be communicated to the technicians for future improvement
 - 6.3.3 Major deficiency may trigger a written warning or immediate dismissal with cause and without notice or compensation.
- 6.4 For every onsite visit, ROM should produce a Form 11. The Form 11 should then be emailed to Dan, Darwyn and the technician and hard-copied to the technician’s personnel file.
- 6.5 ROM should train technicians to request supplies before they run out. The ROM will deliver supplies during site visits. With frequent onsite visits, satellite technicians should never be short of supplies.
- 6.6 GTA ROM will have a storage unit at a location on his/her way home. The Company will deliver supplies in bulk to that storage unit. From there, the GTA ROM will deliver supplies to GTA technicians.
- 6.7 Central and Western Ontario ROM will deliver supplies to non-GTA technicians from Cambridge.

7. OPERATIONAL DEFICIENCIES AND REVIEWS

- 7.1 ROM should discuss every callback with the technician on that job in a face-to-face meeting. Depending on the gravity of the deficiency, the technician may receive a written warning.
- 7.2 All damages including post-job cleanups should be communicated to the ROM. The ROM is required to have a face-to-face meeting with the technician. When the Company incurs monetary loss whether out-of-pocket or through a sales price refund, the technician will receive a written warning.
- 7.3 After the management meeting, ROM will meet face-to-face with any technician who in the previous month sold less than \$500 addons AND whose average addon per job is less than \$10.
- 7.4 Weekly, ROM will review data such as daily average calls, add-on sales, and average time per cleaning job collected through Ramtracking and various reports. This exercise is for the ROM to follow the progress of each technician in real time rather than compile all issues at the month's end.
- 7.5 ROM should review the overall performance of a technician with the technician once a month within 2 days of the management meeting. This meeting could be done on-site, in the shop or by phone. The goal is to do it quickly to course correct for the current month.
- 7.6 In summary, a technician is contacted:
 - 7.6.1: immediately, likely by phone or text if something unusual happens - Section 5.6
 - 7.6.2: face-to-face for callbacks, damages and substandard addon sales - Sections 7.1, 7.2 and 7.3
 - 7.6.3 through on-site visits - Section 6.1
 - 7.6.4 for a monthly report card in person or by phone - Section 7.5
 - 7.6.5 by a courtesy call if the ROM had no contact with the technician during the

whole week - Section 5.7

7.7 Contacts in 7.6 could be combined.

7.8 The ROM is expected to enforce aggressively Policy #1 for incidents in sections 7.1 and 7.2 by using Form 12. While it may not always be the RD's fault, Policy #1 was not meant to always punish but to share the pain.

8. BEHAVIOUR ISSUES

8.1 Technicians may call sick, some more than others

8.1.1 While we may have doubts about technicians calling sick as to the true nature of the illness, we should be careful about reprimanding them about it. After all, they were... sick. ROM should limit their intervention to educate technicians about the harm they cause to the Company and co-workers when not showing up for work.

8.1.2. It is the ROM's responsibility to verify that a technician calling sick is genuinely sick. Those who lie and especially the frequent offenders should be called out and disciplined.

8.2 Misconduct in any way, form or shape will not be accepted.

8.2.1 Technicians have a right to air their grievances. However, they need to do so respectfully following the provisions of the Employee Handbook

8.2.2 ROM needs to know the Employee Handbook cold to apply it. The Employee Handbook has numerous clauses which directly regulate employee behaviour.

8.2.3 The ROM should under no circumstance curse, yell or threaten his/her subordinates. What we don't tolerate from RTs, we don't do it ourselves.

8.2.4 Any technician misconduct, including bad language, hostility, insubordination, rudeness, or non-compliance, shall be dealt with rigorously until resolved.

8.2.5 If a technician feels that his/her aggressivity can push a ROM back this time, he/she will feel emboldened and repeat the same behaviour more recklessly.

8.2.6 As a Company, we treat everyone the same. We don't walk over the amicable ones and let the hotheads get away with murder.

8.2.7 Please see Dan/Darwyn if you need advice. The Company will not back down against employees who violate the provisions of the Employee Handbook.

8.3 Office employees will interact with technicians in the normal course of business.

When a technician becomes belligerent or refuses to collaborate, he/she will be referred to the ROM. It is the ROM's responsibility to resolve any such issue.

- 8.4 We should never let disruptive behaviour slide. If the ROM looks the other way once, he/she is negligent, twice, he/she is a chicken, third time, he/she lose all respect and becomes irrelevant. This Company will never shrink in front of adversity and hostility. We will do the right thing, not take the easy path.

9. PAY and VACATION

- 9.1 ROM should stay on top of each of his/her technicians' wage rates. Taking into account regional disparity and area starting pay, he/she makes recommendations to Darwyn on pay increases based on merit.

- 9.2 Due to the seasonality of the residential business, ROM needs to make sure that vacations are taken during the winter season as per section 3 of Corporate Policy #4.

- 9.3 ROM to approve all time off, personal and vacation using Form 15, and convey the information to the RD.

10. TERMINATION and RESIGNATION

- 10.1 All terminations have to be approved by Darwyn
- 10.2 ROM needs to monitor closely the 3-month probation and the hiring anniversary of each technician.
- 10.3 In case of flagrant misconduct, we can terminate an employee for cause without any need for notice.
- 10.4 When we feel that an employee is more compatible as a contractor, we will provide him/her with working notice and a sub-contracting opportunity.
- 10.5 While some people's work situation takes a drastic turn after a personal event, most people are the same. The ROM should pay close attention during the 3-month probation period to assess whether a trainee is compatible with our line of work.

10.6 When technicians quit or are let go, ROMs should conduct a full exit interview or at the very least write a note about the circumstances of the departure. In every case of a technician leaving, Form 10 should be filled, emailed to Dan & Darwyn and paper copied to his/her personnel file.