

Module 12: Working with Your Team

Goal: Learn to treat techs, field crews, and other departments like customers, so work moves fast, nothing gets dropped, and people trust you.

This lesson uses job titles like "the tech" or "the project manager." No real people or companies are named.

Why This Matters to the Employer

The desk sits in the middle of everything. Calls come in, and you send them out to techs, crews, estimators, billing, and managers. If the desk is slow, unclear, or rude, the whole company slows down. Jobs get missed. Customers wait. Good people get frustrated. When the desk is fast, clear, and kind, the field can do its job. That is what owners notice.

Your Team Is Your Customer

You already know how to treat a customer on the phone. Treat your team the same way.

- **Techs and field crews** need clear addresses, contacts, parts info, and changes as soon as you know them.
- **Project managers and estimators** need complete details so they can price and plan.
- **Billing and the office** need clean notes so invoices go out right.
- **Other departments** need your help, even when it's not "your" job.

In plain words: The tech in the truck is counting on you just like the caller on the phone. Give them the same care.

Respond Fast

When a tech or coworker reaches out, they are usually stuck or waiting on something.

- **Answer or reply right away** when you can. A quick "Got it, working on it" is better than silence.
- **If you can't help yet**, say so and say when you'll get back to them. Then do it.
- **Don't let messages pile up.** Check your phone, email, and chat often during the day.
- **A tech standing at a locked gate** is losing the day. Treat that like a ringing phone.

Clean Handoffs: What / Who / When / Next Step

A handoff is when you pass work to someone else. A messy handoff means calls back and forth, wrong trips, and upset customers. Every handoff should answer four things:

Part	What it means	Example
What	The job or problem, with the key facts	Sprinkler head leaking in the back hallway, water on the floor
Who	The customer, the site contact, and how to reach them	Site manager, best phone number, read back
When	When it's needed and how urgent it is	Urgent, water is still dripping
Next step	What you need the other person to do	Please call the site contact and head over

If any of the four is missing, the person getting the handoff has to come back and ask. Fill it in first.

Examples Across Trades

- **Fire protection.** A fire alarm panel shows a trouble at a school. Your handoff to the service tech: what the screen says word for word, who meets them, that it's urgent, and that the monitoring center needs a call before work starts.
 - **Low voltage.** A crew is pulling cable in a new office. The general contractor calls to say the ceiling is closing early. Tell the crew lead right away and the project manager too. Don't sit on it.
 - **General contractor.** A superintendent asks for an updated drawing for the field. Find out who has it, get it to the super, and confirm they got it.
 - **Restoration.** A water loss call comes in after hours. The on-call crew needs the address, the source of water, whether it's stopped, and who will let them in. Get the crew moving and tell the customer what happens next.
 - **HVAC.** A tech finds a bad part and needs it ordered. Get the part number, the job, and the customer. Pass it to whoever orders parts, then tell the tech and the customer when you know the delivery date.
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Respectful Messages and Tone

People can't hear your voice in a text or email. A few blunt words can sound angry.

- **Say hello and thank you.** "Hi, thanks for the update" goes a long way.
- **Be clear, not cold.** Give the facts, then what you need.
- **No blame in writing.** Write about the problem, not the person.

- **No all caps or a pile of exclamation points.** It reads like yelling.
- **If you're upset, wait** before you hit send. Read it again as if you were the one getting it.

Instead of this...	Write this...
"Why didn't you call the customer??"	"Hi, the customer is asking for an update. Can you call them, or should I?"
"WRONG ADDRESS AGAIN"	"Heads up, the address on the ticket was wrong. Correct one is below. Sorry about that."
"Not my job."	"That's handled by billing. I'll send it over and let you know when I hear back."

(More on writing in Module 7.)

Own Your Mistakes

Everyone makes mistakes. What matters is what you do next.

- **Say it plainly.** "I put the wrong address on that ticket. That's on me."
- **Fix it fast.** Send the right info and help get things back on track.
- **Tell the people affected.** The tech, the customer, or your manager. Don't hope no one notices.
- **Learn from it.** Change how you do it so it doesn't happen again.

Hiding a mistake makes it bigger. Owning it builds trust.

Never Leave People Waiting

Waiting with no answer is one of the worst feelings on a job site.

- **Close the loop.** When you say "I'll find out," come back with an answer, even if the answer is "still waiting."
- **Pass on changes right away.** If the customer cancels or moves the time, tell the tech before they drive out.
- **Don't let a message die with you.** If you're leaving for the day, hand off anything still open to whoever is covering, using what / who / when / next step.
- **If someone else drops the ball,** pick it up and help. The customer doesn't care whose fault it was.

Sense of Urgency: Think Like a Firefighter

A firefighter doesn't wait to be asked twice. When the alarm sounds, they move. Bring that same energy to the desk.

- **Act as if you were the owner.** Would the owner let this sit? Would they want this customer to wait?
- **Act as if you were the person needing help.** Picture the tech stuck at a site, or the customer with water on the floor. How fast would you want an answer?
- **Move first on what matters most.** No heat in winter, a building that isn't secure, active water, or a down fire system come before routine paperwork. (More in Module 2.)
- **Urgent doesn't mean rushed.** Stay calm, get the facts right, then move.

Respect Time and Boundaries

Fast doesn't mean pushy. Good teammates respect each other.

- **Respect people's time.** Put everything in one clear message instead of five little ones.
- **Know who's on call.** After hours, contact the on-call person, not someone who's off, unless your company's rules say otherwise.
- **Respect a "no" or a "not now."** If a tech says they can't take another call today, find another option or ask your manager.
- **Don't interrupt someone on a ladder or in a crawl space** for something that can wait. Send a message instead.
- **Keep your own boundaries too.** Ask for help when you're overloaded. That keeps the work moving.

Do This, Not This

Instead of this...	Do this...
Leave a tech's message unanswered while you finish something else	Reply right away, even just "Got it, working on it"
Send "Go to the job" with no details	Send what / who / when / next step
Blame a coworker in a group text	Talk about the problem and fix it together
Hide a mistake and hope no one notices	Own it, fix it, and tell the people affected
Say "I'll find out" and never come back	Close the loop with an answer or an update
Call the off-duty tech for a routine question	Contact the on-call person or wait for business hours

Example Scenario

EXAMPLE SCENARIO. No real people or companies.

The desk person at an HVAC company gets a text from a tech in the field.

Tech: At the restaurant job. Nobody's here and the back door is locked. Customer isn't answering.

Desk: Got it, thanks for letting me know. Let me call the other contact on the ticket. I'll text you right back.

The desk person calls the second contact, the restaurant's manager, who says the owner is on the way.

Desk: Talked to the manager. The owner is heading over to let you in. Want to wait, or should I move you to your next call and come back?

Tech: I'll wait.

Desk: Sounds good. I'll keep checking. Sorry for the hold-up. I should have confirmed access when I booked it. I'll do that on every call going forward.

The desk person notes the access problem on the ticket, adds the second contact to the customer's file, and texts the tech again once the owner confirms they've arrived.

What went right: The desk answered right away, called the backup contact, and gave the tech a clear choice. They owned the missed step without making excuses, closed the loop, and fixed the notes so it won't happen again.

Practice Scenario

Try this one on your own.

A restoration crew lead calls the desk. They finished drying out a basement and need the job closed so billing can invoice. But the customer told the desk this morning they found a new wet spot in another room. No one told the crew.

Think about:

- What do you say to the crew lead first?
- What does your handoff look like? (What / who / when / next step.)
- Who else needs to know, and how do you word it with respect?

One good answer: Own that the message didn't get passed on. Tell the crew lead about the new wet spot right away. Hand it off with the room, the customer contact, how urgent it is, and the next step (go check it before closing). Then tell billing to hold the invoice until the crew confirms.

Quick Tips

- Treat techs, crews, and other departments like customers.
- Reply fast. "Got it, working on it" beats silence.
- Every handoff: what / who / when / next step.
- Be kind and clear in writing. No blame, no all caps.
- Own your mistakes. Say it, fix it, tell the people affected.
- Never leave people waiting. Close the loop.
- Think like a firefighter. Act like the owner or the person who needs help.
- Respect people's time, who's on call, and their boundaries.

Quiz

1. A tech texts you that they're stuck at a locked gate. You're in the middle of entering notes. What do you do?

- a) Finish your notes first, then reply
- b) Reply right away and start working on getting them in
- c) Wait for the tech to call the customer

Answer: b. A tech stuck at a site is losing the day. Treat it like a ringing phone.

2. What four things should every handoff include?

- a) What, who, when, and next step
- b) Name, date, price, and signature
- c) Just the address

Answer: a. If any of the four is missing, the other person has to come back and ask.

3. Which message is the most respectful?

- a) "WRONG ADDRESS AGAIN"
- b) "Why didn't you call the customer??"
- c) "Hi, the customer is asking for an update. Can you call them, or should I?"

Answer: c. It's clear, kind, and talks about the problem, not the person.

4. You booked a tech to the wrong address. What's the best move?

- a) Say nothing and hope it works out
- b) Blame the customer for giving a bad address
- c) Own it, send the right address fast, and tell the people affected

Answer: c. Hiding a mistake makes it bigger. Owning it builds trust.

5. You told a project manager "I'll find out" about a part. You haven't heard back from the supplier yet. What do you do?

- a) Give the project manager an update that you're still waiting
- b) Say nothing until you have the full answer
- c) Forget about it, the project manager will ask again

Answer: a. Close the loop, even when the answer is "still waiting."

6. What does "think like a firefighter" mean at the desk?

- a) Rush and skip the details
- b) Move fast on what matters, as if you were the owner or the person needing help
- c) Only work on emergencies

Answer: b. Urgent means moving with purpose. Stay calm and get the facts right.

7. It's after hours and you have a routine question for a tech who is off today. What do you do?

- a) Call them anyway
- b) Send it to the on-call person or wait for business hours
- c) Text them over and over until they answer

Answer: b. Respect people's time and boundaries. Use the on-call person for after-hours needs.