

Module 4: Time

Goal: Book jobs in clear arrival windows, keep the schedule realistic, and tell customers right away when plans change.

About 8 minutes

All names, phone numbers, addresses, and companies in this lesson are made-up examples. They are marked "(example)".

Why This Matters to the Employer

Customers judge a trade company on one simple thing: did they show up when they said they would? A good schedule keeps customers happy and keeps techs busy without running them ragged. A bad one means late techs, angry calls, and wasted drive time.

Use Arrival Windows

An **arrival window** is a range of time when the tech will show up, like 8 to 10 AM. Use windows, not exact times.

Why? Jobs run long. A "quick fix" turns into a part swap. Traffic backs up. A window gives the tech room to do the job right and still be on time.

Say it clearly: "The tech will arrive between 1 and 3 PM. They'll call when they're on the way."

Use the windows your company uses. Don't make up new ones.

Ask When the Customer Is Available

Before you offer a time, ask:

- "When is someone available to be there?"
- "Are there any times that won't work?"
- "Is there a time the site closes or the gate locks?"

Write down any limits in the ticket. "Customer works until 3 PM." "Gate locks at 6 PM." "No mornings, baby naps." Small details like these prevent a wasted trip.

Know Your Response Times

Response time is how fast your company aims to get someone out for each urgency level. For example, your company may aim to reach emergencies within a few hours, same-day calls by end of day, and scheduled jobs within a set number of days.

Learn your company's actual targets. Then be honest with customers. If the earliest same-day slot is 4 PM, say 4 PM. Don't say "soon" or "right away" if it isn't true.

Think About Drive Time

San Diego is spread out, and traffic is real. When you book jobs:

- Group jobs in the same area when you can.
- Don't book one tech in two far-apart places back to back.
- Leave room between jobs for drive time and parking.
- Know which techs cover which areas, if your company splits it that way.
- On a construction site, check with the superintendent so your crew isn't booked in the same area as another subcontractor.

A schedule that looks full on screen but can't be driven isn't a good schedule.

Match the Job to the Time

Some jobs take longer than others. A tune-up is short. A water heater swap or a panel upgrade can take most of a day. Ask the tech or your lead how long common jobs take. Then book enough time. Don't stack a big job right before a tight window.

When Plans Change, Call First

Techs run late. Parts don't show. Emergencies jump the line. That's normal. What matters is how you handle it.

- **Call the customer as soon as you know.** Don't wait for the window to end.
- **Give a new time,** or a time you'll call back with one.
- **Offer a choice** if you can: "Can you do 5 PM, or would tomorrow morning be better?"
- **Update the ticket** with the new time and why.

Customers forgive a late tech much faster when you call them first.

Say This, Not This

Instead of this...

Say this...

"The tech will be there at 2:00."

"The tech will arrive between 1 and 3. They'll call on the way."

"Someone will be out soon."

"The earliest open window is 4 to 6 PM today."

(Silence until the customer calls asking where the tech is)

"Hi Kevin, this is Chris. Rosa is running about 45 minutes behind. Does 6:15 still work?"

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

Chris: Thanks for calling Example Heating & Air (example), this is Chris. How can I help?

Caller: My water heater isn't making hot water. I'm Kevin Nguyen (example).

Chris: Sorry about that, Kevin. What's the best number for you?

Caller: (619) 555-0134.

Chris: (619) 555-0134. Is any water leaking?

Caller: No, just cold.

Chris: Okay. We'll treat that as same day. When can someone be home?

Caller: I work until 3. I can be home by 3:30.

Chris: I can book a 3:30 to 5:30 window today. Our plumber, Rosa (example), will call you about 30 minutes before she arrives. Does that work?

Caller: Yes, thanks.

Later that afternoon, at 4:45, Rosa texts the office. Her last job is running long.

Chris: *(calls Kevin)* Hi Kevin, this is Chris from Example Heating & Air (example). Rosa is running about 45 minutes behind on her last job. She can be there around 6:15. Does that still work, or would tomorrow morning be better?

Caller: Tonight's fine. Thanks for calling.

Chris: Thanks, Kevin. I'll let Rosa know. She'll call you when she's on the way.

Chris updates the ticket: "New ETA about 6:15 PM. Customer OK'd. Rosa delayed on prior job. 4:47 PM – CR."

What went right: Chris asked when Kevin was home, booked a real window, and set expectations for a call ahead. When Rosa ran late, Chris called Kevin before the window ended, gave a new time, offered a choice, and updated the ticket.

Quick Tips

- Book windows, not exact times.
- Ask when someone can be there and what times won't work.
- Learn your company's response times. Be honest with customers.
- Plan for drive time. Group jobs by area.
- Book enough time for the size of the job.
- Running late? Call the customer first, before the window ends.
- Update the ticket with every time change.

Quiz

1. What is an arrival window?

- a) The exact minute the tech arrives
- b) A time range when the tech will arrive, like 8 to 10 AM
- c) How long the job will take

Answer: b. A window gives room for traffic and jobs that run long.

2. A tech will miss the window. When should you call the customer?

- a) After the window ends
- b) Only if the customer calls first
- c) As soon as you know

Answer: c. Calling first keeps trust, even when the news isn't good.

3. Why think about drive time when booking?

- a) So the tech can actually reach each job on time
- b) To use less gas only
- c) It doesn't matter if the schedule looks full

Answer: a. A schedule that can't be driven will run late all day.

4. The earliest open slot is 4 PM, but the customer wants someone now. What do you say?

- a) "Someone will be there right away."
- b) "The earliest open window is 4 to 6 PM. If something opens sooner, I'll call you."
- c) "There's nothing I can do."

Answer: b. Be honest about the time and offer what you can control.

5. A customer says, "I work until 3." Where does that go?

- a) Nowhere, you'll remember
- b) In the ticket, so whoever books or dispatches sees it
- c) In a text to the customer

Answer: b. Anyone who touches the job needs to know the customer's limits.