

Module 8: Professionalism and Reliability

Goal: Be the person the techs, customers, and managers can count on, every day.

About 6 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

The office runs on trust. Techs need to trust that the info you give them is right. Customers need to trust that you'll call back. Managers need to trust that nothing slips. Skills can be taught. Being reliable is what makes people want you on the team.

Show Up On Time

Trade companies often start early, because techs roll out early. The desk needs to be ready when the first call comes in and the first truck leaves.

- Be at your desk and logged in before your start time.
- If you're going to be late or out, tell your manager as early as you can.
- Know who covers for you, and leave them what they need.

If you come from the military or field work, you already know this one.

Close the Loop

"Close the loop" means you finish what you start and tell the people who are waiting.

- Said you'd call back by 2? Call by 2, even if it's just "Still working on it."
- Asked someone for something? Follow up if you don't hear back.
- Handing off a job? Tell the next person, and note it in the ticket.

Open loops are how jobs get forgotten.

Protect Private Information

You'll see a lot of private details at the desk:

- Customer names, phone numbers, and addresses
- Gate and lockbox codes
- Prices, quotes, and payment info
- Employee info, if you help with recruiting or the office

Share it only with people who need it for the job. Don't leave it on screens or papers where others can see it. Follow your company's rules for handling payment info.

Respect the Techs

Techs work in hot attics, under houses, and on roofs. The desk makes their day easier or harder.

- Give them complete, correct info before they roll.
- Answer their calls and texts fast. They may be standing in a customer's driveway.
- Don't over-promise to customers on their behalf.
- Say thanks. It costs nothing.

When the desk and the field work as one team, everyone looks good.

Own Your Mistakes

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

1. **Fix it fast**, if you can.
2. **Tell your manager early**. Don't let them find out from a customer.
3. **Update the record** so the next person has the right info.
4. **Learn from it**. Ask, "What can I do so this doesn't happen again?"

Fixing it fast matters more than being perfect.

Stay Steady

Some days the phone won't stop and the schedule falls apart. Stay calm. Handle the most urgent thing first. Ask for help when you need it. Being steady under pressure is a skill many people from the military and field work already have. It's just as useful at the desk.

Do This, Not This

Instead of this...	Do this...
Hope nobody notices a mistake	Fix it and tell your manager right away
Let a 2 PM callback slide to 4 PM	Call at 2, even if it's just "Still working on it"
Leave a customer's card info on your desk	Follow company rules and keep it out of sight

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

It's a busy morning at Example Heating & Air (example). Jen (example), an electrician, calls the office from a job site.

Jen: Hey Chris, I'm at the gate at 123 Example Ave (example). The code in the ticket isn't working.

Chris: *(checks the ticket and Dana's original call notes)* That's my mistake, Jen. I typed it wrong. Let me call the site contact right now.

Chris calls Luis (example), the on-site maintenance person, at (619) 555-0158.

Chris: Hi Luis, this is Chris from Example Heating & Air (example). Our electrician is at your front gate and I gave her the wrong code. Can you confirm it for me?

Luis: No problem. I'll walk out and let her in.

Chris: Thank you, Luis.

Chris calls Jen back.

Chris: Luis is walking out to let you in now. Sorry for the hold-up.

Jen: Thanks, Chris.

Chris fixes the code in the ticket and adds a note: "Gate code corrected. Original entry was a typo. Confirmed with Luis (example). 9:12 AM – CR."

Then Chris tells the manager, Pat (example): "Quick heads up. I entered a wrong gate code on the Example Ave job. Jen lost about 10 minutes. It's fixed. From now on I'll check codes in the ticket against my call notes before I save."

What went right: Chris owned the mistake, fixed it in minutes, updated the record, told the manager before anyone else did, and named what would change. That's what reliable looks like.

Quick Tips

- Be at your desk and ready before your start time.
- Close the loop: do what you said, when you said.
- Keep private info private. Follow company rules for payment info.
- Respect the techs. Fast, complete info makes their day.
- Make a mistake? Fix it, tell your manager, update the record, learn.
- Stay steady when it gets busy. Handle the most urgent thing first.

Quiz

1. What does "close the loop" mean?

- a) Hang up the phone
- b) Finish what you said you'd do and tell the people waiting
- c) Close the ticket as fast as you can

Answer: b. Open loops are how customers and jobs get forgotten.

2. You made a mistake on a ticket. What should you do?

- a) Fix it, tell your manager early, and update the record
- b) Fix it quietly and hope nobody asks
- c) Wait to see if anyone notices

Answer: a. Your manager should hear it from you, not from a customer.

3. Which is private info you should protect?

- a) The company's main phone number
- b) Gate codes and customer payment info
- c) The company's business hours

Answer: b. Codes and payment info can do real harm in the wrong hands.

4. You told a customer you'd call back by 2 PM, but you don't have an answer yet. What do you do?

- a) Wait until you have an answer
- b) Call at 2 and say you're still working on it
- c) Text the tech instead

Answer: b. Keeping the time you promised builds trust, even without full news.

5. A tech calls from a customer's driveway with a question. What's the right move?

- a) Call back when the phones slow down
- b) Answer as fast as you can
- c) Tell them to email

Answer: b. A tech waiting on the desk is a job on hold.