

Module 9: Work Mode

Goal: Switch from play mode to work mode when you clock in. Dress the part, act the part, and be nice to everyone.

About 10 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 the company by the first voice they hear and the first person they see. Think of a character at a theme park. Once guests can see them, they stay in costume and in character. They don't check their phone mid-show or tell a family in line about their bad day. The desk works the same way. When you stay in your role, the whole company looks good.

Switch Into Work Mode

Play mode is your own time. **Work mode** means you're **on stage**, playing the role of the company's desk person. Breaks, lunch, and after work are **off stage**.

- **Act your job.** Like the theme park character, dress the part and act the part whenever customers, techs, or visitors can see or hear you.
 - **Leave personal issues outside of work.** They can wait until you're off stage. It's okay to have a bad day. Everyone does. If something serious is going on, tell your manager.
 - **Be punctual.** On time for your shift, back on time from breaks and lunch, and on time to meetings. Ready to work at start time, not just walking in. (More in Module 8.)
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Bring a Nice, Can-Do Attitude

- **Be nice. Be kind.** Be friendly and polite to everyone: customers, techs, coworkers, delivery drivers, and vendors. Even when you're busy. Even when they're not nice first.
 - **Lead with "Let me find out,"** not "That's not my job."
 - **Take direction and feedback.** Listen, ask if it's unclear, and try it their way.
 - **Skip the drama and gossip.**
 - **Vent off stage.** Finish the call, then talk to your manager in private. Never in a group chat.
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Work With a Sense of Urgency

Think like a firefighter. When the alarm rings, nobody says, "I'll get to it after lunch." They don't panic either. They move fast, stay calm, and know exactly where they're going. That's the mindset for the desk.

- **Treat every request like it matters to the person asking.** For the customer, it's their home or their business. A broken AC in July, a shop down for the day: to them it's an emergency.
- **Picture yourself on the other end.** If you were the one waiting on a part, a call back, or a time window, how fast would you want an answer? Do that for them.
- **Think like the owner.** The owner wants every call answered, every job on the schedule, and every customer feeling taken care of. Ask yourself, "What would the owner do right now?"
- **Move fast, not frantic.** Do the next right thing, then the one after. Calm hands, quick feet.
- **Don't sit on it.** Finish what you can now. If you can't, pass it to the right person with the details, and tell the customer what happens next and when.
- **Close the loop.** When you say you'll call back by 2, call back by 2, even if the answer is "still working on it."

Urgency is not rushing the customer or being rude. It means you act like it matters, because it does.

Dress the Part

A trade office isn't a bank or a job site. Your "costume" is clean and neat.

- **Ask what the dress code is.** Every company is different.
 - **Wear the company shirt** if they give you one.
 - **Wear closed-toe shoes** if you walk into the shop or warehouse. Ask if safety shoes are required.
 - **Keep clothes clean and in good shape.** Showered, hair neat, and easy on the cologne.
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Act the Part

- **Say "yes sir" and "yes ma'am."** It's the respectful default with customers and anyone you don't know. "Yes sir, I can help with that." If someone asks you to use their name, switch.
 - **No cursing** on the phone or where customers can hear.
 - **Talk about people with respect,** even when they can't hear you.
 - **Keep your desk tidy.** Visitors walk by.
 - **Take breaks and lunch at the agreed times.** When you step away, tell the person covering for you.
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Put the Gadgets in Their Place

- **Personal phone:** On silent and put away. Check it on breaks and at lunch.
- **Expecting an urgent call,** like about a sick kid? Tell your manager at the start of your shift.
- **Earbuds:** None while you're on the phones. Use the company headset.
- **Company devices:** For work only. No personal social media, shopping, or streaming. Assume they may be monitored. Check your company's policy.
- **Photos:** Never post job sites, customers, their homes, your screen, or the schedule. Job photos go in the ticket.

Do This, Not This

Instead of this...

Do this...

Keep your phone face up on the desk "just in case"

Silence it, put it away, and check it on breaks

Bring a bad morning onto the phones

Leave it off stage. If it's serious, tell your manager.

Post a funny job-site photo on social media

Keep job photos in the ticket, never online

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

It's 7:20 AM at Example Heating & Air (example). Chris arrives in his company shirt and work boots, since he'll be in the warehouse later. His son is home sick with Chris's mom. Chris stops by the manager's desk.

Chris: Morning, Pat (example). My son's home sick. If my mom calls, I may need to step away for a minute. Otherwise my phone's in my drawer.

Pat: Thanks for the heads up. That's fine.

Chris puts his phone away and opens the schedule. When the first call comes in at 7:30, he's ready.

Caller: My AC is rattling really loud. Can someone come out today?

Chris: Yes ma'am, I can help with that. Can I get your name and best number?

Mid-morning, Andre (example), an HVAC tech, calls from a job.

Andre: That customer just chewed me out about the price. I don't even set the prices.

Chris: That's rough, Andre. Sorry you had to take that. Anything you need from me?

At lunch, Chris checks his phone. A text from his mom: "He's feeling better." Chris is back at 12:30, on time.

What went right: Chris was on stage and ready at 7:30, dressed for the warehouse with his phone put away. He kept his worry about his son off stage and told Pat ahead of time. He said "yes ma'am," was kind to Andre, and checked his phone only on his break.

Quick Tips

- On the clock, you're on stage. Be on time, and dress and act the part.
- Personal issues wait until you're off stage. Serious? Tell your manager.
- Be nice and kind to everyone, even when you're busy or they're not.
- Act like it matters: move fast, stay calm, pass it on with details, close the loop.
- Default to "yes sir" and "yes ma'am." Switch to a name if they ask.
- Ask about the dress code. Closed-toe shoes for the shop.
- Phone away. Never post job sites, customers, screens, or schedules.

Quiz

1. What should you do with your personal phone during your shift?

- a) Keep it face up on the desk
- b) Put it on silent, put it away, and check it on breaks
- c) Answer quick texts between calls

Answer: b. Your phone is for off stage.

2. Your child is home sick, and the sitter may call today. What's the best move?

- a) Tell your manager at the start of your shift
- b) Keep your phone out and answer whenever it rings
- c) Say nothing and step out if it rings

Answer: a. Most managers will work with you when they know ahead of time.

3. A tech texts a funny photo from a customer's attic. A coworker says to post it. What do you do?

- a) Post it, but crop out the address
- b) Send it to a few friends instead
- c) Don't post it. Job photos stay in the ticket.

Answer: c. A customer's home is never content for your page.

4. You had a rough morning at home. What does being "on stage" mean today?

- a) Tell callers, so they understand if you sound off
- b) Keep it off stage and be friendly on calls. If it's serious, tell your manager.
- c) Keep your answers short until you feel better

Answer: b. Like a theme park character, you stay in your role while customers can see or hear you.

5. It's your first week, and nobody has mentioned a dress code. What should you do?

- a) Ask your manager. Until then, go clean and neat, with closed-toe shoes.
- b) Wear what you'd wear on the weekend
- c) Wait until someone says something

Answer: a. Every company is different. Asking is the safe move.

6. A customer calls at 3 PM. Their walk-in cooler is down and their food is at risk. The dispatcher is at lunch until 3:30. What do you do?

- a) Take their name and number and tell them dispatch will call back when she returns
- b) Take the details, then reach dispatch or the manager right away, and tell the customer exactly what happens next and when
- c) Tell the customer to call back after 3:30

Answer: b. Act like the owner or the person needing help: move now, pass it to the right person with the details, and tell the customer the next step.