

Your First Day on the Job

For new hires starting at a trade company desk (HVAC, plumbing, electrical)

You got the job. Congratulations. Every trade company does things a little differently, so use your first day to learn how yours works. Ask these questions to your manager, trainer, or whoever shows you around. Write the answers on this sheet, and keep it at your desk.

Safety and emergencies

- 1 Can I get a copy of our emergency script for a gas smell, smoke, sparks, flooding, or someone hurt?

- 2 When should I tell a caller to call 911 or the utility company first?

- 3 Who do I call right away about a safety issue or an injury?

Urgency rules

- 4 What counts as an emergency, same day, or scheduled here?

- 5 Do no heat or no AC count as emergencies, like in a heat wave or with an elderly person or a baby at home?

- 6 Do we take after-hours or weekend calls, and do they cost more?

- 7 Who is the on-call lead after hours?

Response times and scheduling

- 8 What are our response time targets for each urgency level?

- 9 What arrival windows do we use?

- 10 Which techs cover which areas and trades?

- 11 How long do common jobs take, like a tune-up, a water heater swap, or a panel upgrade?

- 12 Who makes the final call on the schedule, me or the dispatcher?

Who gets what

- 13 Can I get the team contact list with names, roles, and numbers?

- 14 Who handles dispatch, estimates, purchasing, fleet, billing, safety, and hiring?

- 15 Who should get complaints or anything unusual?

- 16 When should I call, text, email, or just add a note to the ticket?

Tickets and software

- 17 What do we use for tickets, scheduling, and phones? Can I get my logins today?

- 18 Which fields are required on every ticket?

- 19 Is there a note format or a list of abbreviations we use?

- 20 Can customers see our notes or invoices?

Parts and ordering

- 21 Do I order parts, or send requests to purchasing?

- 22 Which suppliers do we use, and do we have accounts with them?

- 23 Is there a spending limit before I need approval?

- 24 Where do parts get delivered or picked up?

Codes, privacy, and payments

- 25 Where do gate and lockbox codes go in the ticket?

- 26 How do we handle credit cards and payment info?

- 27 What customer info can I share, and with whom?

My hours and coverage

- 28 What are my hours, and when do the first calls and trucks start?

- 29 Who covers my desk at lunch, on breaks, and on days off?

- 30 How do I hand off open callbacks at the end of my shift?

- 31 Who do I tell if I'm running late or out sick?

Phones and customers

- 32 Is there a standard greeting you want me to use?

- 33 Can I quote prices on the phone, or does that go to the estimator?

- 34 What's our policy on warranties, callbacks, and complaints?

When I'm not sure

- 35 Who should I ask when I'm unsure, and is it okay to put a caller on hold to check?

- 36 Who will check my work in my first few weeks?

- 37 What do the best desk people here do that I should copy?

Name: _____ Company: _____ Start date: _____

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