

## Letter of Expectations

**To:** Service Dispatch  
**From:** Service Manager & General Manager  
**Subject:** 20XX Expectations, Role and Compensation Plan

20XX is a crucial year for ABC with respect to change, and the importance of your position in the company.

Service and maintenance take the forefront once again in 20XX.

Critical changes are necessary to make the service and maintenance department function more effectively. The service management function must be a leading practitioner of “Better Practices” that make the department the model for the market place.

Simultaneously, we have the need as a company to enact changes that are difficult and require both understanding, and behavioral changes.

Your position title is “Service Dispatcher”.

This position’s compensation, expectations, goals and implementation plan is enclosed.

The plan is different than what you may have been used to in the past. You have an opportunity to earn well, perhaps better than ever before. It will be based on the performance of the department. You are the leader of the department.

You will be responsible for your functional area. It will require skills, leadership, and deft communication. It will be a challenge. It will be frustrating at times. It requires change. We believe you are up to this challenge and the right person to lead the changes!

You need to understand the “**key performance indicators**” for your department and you need to drive the processes that support these KPI’s aggressively.

The challenge is large and will not be easy, yet it is attainable and can be both gratifying and profitable.

Please review the compensation and the Key Performance Indicators, as well as what the company feels is the critical success factors for 20XX.

Service Manager/General Manager

## The Year Plan:

Your critical success factors for the service department of ABC in 20XX are:

1. The support of technicians in their scheduling efficiency to hit 85% 1st time call completion.
2. Positive focus and attitude toward maintenance agreement scheduling.
3. Improving the service department efficiency rating to 75% (6/8) hours billable for each technician.
  - a. This includes the elimination of warranty callbacks to a level of 1% or less
  - b. Maintaining tracking discipline and goal boards.
4. Improving the gross margin % in service to over 60% - target is 65% - base is 60%.
5. Maintenance Agreements success to sell over 6000 in 20XX.
6. Enhancing support for service technician training program for 2025 and technicians to complete as part of your scheduling activity.
7. To establish split shifts and set extended hours scheduling 7AM –7 PM Mon through Saturday.
8. Train another dispatch function – to support the service/maintenance team.
9. Implement new software properly for service operations.
10. Maintain flat rate pricing system notes for repair changes and technician training.
11. Support by reviewing each invoice that comes back before management review.
12. Effectively training and executing technician lead turnovers for replacement leads by using competency based dispatching so appropriate personnel are dispatched to their work.
13. Driving accessory sales of identified products on truck stock (humidifiers, air cleaners, UV lights, CO Detection, and Thermostats)
14. Maintaining cost controls – overhead at 34% or less with fleet control practices in place to control gasoline costs, and vehicle related costs.
15. Maintain image policy - trucks, uniforms, personal appearance, and demeanor for the service operation.

## Dispatcher Expectations:

### 1. Company Values and Philosophy

- a. Adhere to and exemplify the Company's stated core values and beliefs.
- b. Promote the company and the brand wherever possible.
- c. Conduct operations of sales department within the framework of the law and the ethics of good business practices.
- d. Exercise good judgment in all areas where the company's interests are represented.
- e. Work with a team first, individual second philosophy.
- f. Come to work each and every day dressed with a positive mental approach.

### 2. Leadership Expectations

- a. Set the tone for the service department by living the company core values.
- b. Set clear, concise expectations for all personnel who report to you.
- c. Provide constructive feedback on a regular basis to all department employees.
- d. Keep the service department neat, clean and organized, the same for your desk area.
- e. Lead the department effort to create a safe learning environment.
- f. Develop key personnel in the service department to prepare them for future opportunity.
- g. Implement training and skill development programs as directed by the GM.
- h. Produce & track employee performance based on specific KPI's.

### 3. Customer Service Expectations

- a. Assure 100% customer satisfaction.
- b. Exceed customer's expectations for quality and value.
- c. Handle and resolve all customer complaints within 24 hours, or within policies.
- d. Insure that the phone is answered within three rings at all times.
- e. Return all calls within same day.
- f. Communicate with GM on a regular and routine basis to resolve questions, concerns, or issues.

### 4. Service Dispatch - Department Performance

- a. Meet or exceed all assigned financial goals.
- b. Implement all company better practices that apply within the department in a timely manner.
- c. Manage the dispatch function - department to meet or exceed the company KPI's.
- d. Hire/Identify a successor to the dispatch function if required. Provide training and mentor individual to become a SM candidate.

- e. Participate in regular center meetings and functions to develop a team.
- f. Develop departmental goals that align with company goals each year.
- g. Gain thorough and complete understanding of how department performance impacts the company financial and KPI results.

## 5. Communications, Reporting and Compliance

- a. Dispatch will report all relevant information, reports and data to the SM as required.
- b. Dispatch will immediately report any relevant issue regarding safety, compliance, or legal directly to the SM.
- c. Dispatch will participate in Company meetings, hold regular sales department meetings and participate in company planning.

## 6. Reviews, Feedback and Personnel

- a. Dispatch will conduct performance reviews with all department personnel as directed by SM – quarterly reviews.
- b. Dispatch is responsible for providing constant positive coaching and feedback to team members – daily and weekly service meeting for weeks review.
- c. The Dispatcher will work with the SM to define training needs within the department.

## 7. Skill Development (See last page)

- a. Dispatch will identify areas needing and provide resources to insure proper skill development in the service department.
- b. Dispatch will provide routine and ongoing training (technical, customer service, time management, etc.) for all technicians and personnel.
- c. Dispatch will work with SM to develop a set of personal development goals.

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Manager Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## 20XX Dispatcher Incentive Program

- Base Salary of \$ XX paid weekly, or Hourly Pay of \$ XX per hour
- Standard Company Benefit Program
- The Total Company Profit Sharing Program
- Bonus Program:
  - When Gross Sales of Service/Maintenance together reach or exceed \$ xxx,000 and gross profit dollars reach \$ xxx,000 the department will be at target. This is a target of 60% gross margin percentage on sales. A bonus of 10% of all incremental margin dollars will be paid over \$ xxx,000 and shared among the employees in service administration so long as the margin percentage remains above 60%.
  - When the department reaches xxx USA service agreements, a one-time bonus of \$ 1000. At xxx USA's will be paid.
- Key Performance Measures for Dispatcher Quarterly Reviews:
 

• Gross Margin xx % in Service	55%
• Service Efficiency for Overall Service Department	75% in 2025
• # of USA Service Agreements Sold	xx in 2025
• % of Renewals of Service Agreements Sold	85% in 2025
• Completion of Technical Training Program	100%
• # of Leads Turned to Sales (1 of 20)	150 Leads
• 1st time call completion rate for service department	85 %/2025
• Inventory turns in service of repair parts on trucks	4 for 2005
• Overhead maintained	34% or below
• Receivables aged at 15 days or less, not to exceed	\$ 20,000
• Customer satisfaction rating	9.0 or higher

Employee Signature: \_\_\_\_\_ Manager Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_

## Role Description

<b>Title:</b>	<b>Service Dispatcher</b>
<b>Reports To:</b>	<b>Service Manager</b>
<b>Location:</b>	<b>Field Operations</b>
<b>FSLA Status:</b>	<b>Exempt</b>

### Scope of Role:

Maintain the Service & Maintenance Technicians daily schedules.

Set the dispatch board and the technicians for service calls.

Insure they are all properly completed.

Schedule any return trips with customers, and track the completion rating.

Maintain the on call schedule for service technicians. Maintain customer database with current information.

Clear and concise communications with department managers, employees and company customers, including keeping customers appraised as to company schedule and requested lead-times. Provide accounting with maintenance contract billing information.

### Work Hours:

7:00am to 4:00pm shift 1- Monday through Friday

10:00am to 7:00pm shift 2- Tuesday through Friday, Saturday 7:00 AM – 11:00AM

### Functional Areas of Accountability:

#### Daily Duties:

1. Dispatch Service Technicians, one call at a time.
2. Respond to all messages left overnight.
3. Schedule and coordinate all demand service calls as calls are received.
4. Create work orders for all service calls in computer system.
5. Maintain the dispatch board and filing system.
6. Contact customers with a "Parts Pending" status as parts are received for scheduling.
7. Maintain the Maintenance Agreements, including billing, scheduling, database information, customer hard files and renewals.
8. Help Service Manager with marketing issues as directed.

9. Update customer files as information is received from installation. (Extended Warranties, equipment info, new customers, Birthday tickle file, etc.)
10. Type service agreement proposals for new customers.
11. Maintain on call schedule, to include 1st on call and standby technician.
12. Maintain customer history files in database.
13. File work orders.
14. Prepare paperwork for all manufacture warranty parts.
15. Update service database from each service ticket.
16. Maintain a competency system for technicians for dispatch procedures.

**Performance Measurements:**

1. Attitude and demeanor with customers (Subjective) and as rated by customer debrief and hidden shopping audits.
2. 85% first time call completion ratio.
3. Review each invoice for service manager for accuracy and note exceptions if any.
4. Maintaining the weekly tracking board system by technician
5. Number of customer complaints due to scheduling.
6. Number of return trips/call backs due to scheduling inefficiencies.
7. 100% Accuracy of customer history files.
8. 100% Accuracy of customer Maintenance Agreement files.
9. Timeliness of billing information to accounting.

**Personal Skill Development Plan:**

As noted by manager and employee for the year.

**Training Plan for Dispatcher**

- EXCEL – Basic Spread Sheet
- EXCEL – Intermediate
- Software Training – based on choice.
- Financial Training – Learning the P&L and how it relates to service.