



## The Honest Advantage

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GSA Quality Assurance and Customer Care Guidelines

The GreenStar Alliance | 2017



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# GreenStar Alliance

## Introduction



### Introduction

The GreenStar Alliance concept was founded on building trust while serving our customers with the best values and services possible in our industry. In order to provide the best that we can offer, we have prepared Quality Assurance (QA), Quality Control (QC), and Customer Care principles for our management, support personnel, and membership to follow. Each person in the GreenStar Alliance (GSA) business structure is critically important and essential for our concept to be nurtured and grown throughout our organization AND membership. QA, QC, and Customer Care is not something that we can simply develop procedures with steps in place, because it will not address all that may befall each person that is involved with GreenStar. The foundation on which GreenStar is built is radiated through our believes in WHY. Everything we do within the GSA is driven by why we do what we do. How GSA drives the business model is what delivers the absolute best we can offer. Therefore, the QA/QC and Customer Care guidelines are developed and improved upon as principles. All guidelines developed for the people associated with GreenStar shall remain as transparent and simple as practical and always tie back to our why.

The GSA Team shall review these principles on an ongoing basis as needed and address those areas that require the attention needed to constantly improve the way we take care of our customers while continually providing incredible values.

GreenStar adapts to the changing world and personal needs by empowering everyone through open policies and training. By empowering each person GreenStar can continue improving through constant wide-scoped innovation.

GreenStar strives to provide clarity in what it does by defining a clear path to the expected outcome. "What we measure we can improve". An old say goes like this "where focus goes, energy flows..."

### Quality Assurance

Quality assurance principles will cover the entire GreenStar Alliance organization. This includes the management, support, and membership. The overall QA and QC principles are achieved by the development of a dynamic team concept. The principles of GSA shall be exhibited as we “walk the talk” and stay connected with all aspects of the business.

The primary method of ensuring that the entire GreenStar Alliance organization and membership constantly strive to improve will be by measuring our results. Each customer will get the option to participate in a 4-part survey. The GSA management team has in place a follow up review to confirm customer, member, and employee satisfaction. The program is in its’ infancy and will mature into a synergistic tool that will allow GreenStar, our membership, and employees to be the best in our industry.

To achieve the quality assurance expectations consistently the policy guidelines are spelled out conceptually.

### THE NUMBER ONE RULE

There seems to always be rules – and most do not allow adequate flexibility. So, in the case of GreenStar, our number one rule is to always ask questions when something does not appear, feel, or seem like it is the right thing for that given situation. Simple right.

### COMMON SENSE RULE

Always apply a multitude of scenarios to any situation based on your experience. And if you do not have experience in a given situation, defer to the “Number One Rule”.

### TRAINING RULE

The HVAC industry is vast and is constantly growing. There are areas of technical expertise that make it almost impossible for one person to know, retain, be good at, or be an expert at, it all. Therefore, when a job requires a level of knowledge that you do not have, seek out manufacturer preferred training. Always make sure your technical library is current so you do not depend on memory. GreenStar will maintain an online resource area with direct links to manufacturer equipment specifications. We highly recommend you stage your own and share those you find.

It is highly recommended that you attend HVACR conferences and network to seek out those experts in your field of interest, or areas that you find interesting. The more structured training you expose yourself to, the more value is gained for yourself, and your company.

### QUALITY ASSURANCE AND CONTROL

Quality control is a massive undertaking because it is not just you. The manufacturers must ensure the material they use in the construction and assembly processes meet the given quality standards. The warehousing process must make sure that the inventory is properly rotated. The HVAC technician must make sure they have the proper tools and knowledge to deal with each aspect of their day to day roles and tasks. Part of that includes incorporating proven techniques and strategies. In order to repeat the same level of quality and consistency, and pass it on to those training under them, the “checklist” was born. One of the best methods to ensure consistency with each installation and measure success while maintaining a level of quality control, is the implementation of checklists. Your customer deserves the best you can offer, and if you are the expert handing the responsibility off to someone with less experience, a checklist will help. The checklist provides a way to consistently train your new hires to a level of competency and expertise that will one day match or exceed the expectations given.

You will find a resource section in the back of this guideline that contains examples of checklists and resource links where you can create your own for those critically important tasks or installations. Give your company and your customers a piece of mind knowing that each task, job, or project is done using proven methods.

### Customer Care

The GreenStar customer care approach is established on some of the most basic principles. As we direct our attention to our customers, we will be able to provide the best customer care by improving our abilities and focus. Each of the topics discussed below is key to improving our ability to serve our customers with the best care possible.

The Customer Care principles will cover the entire GreenStar Alliance organization. This includes the management, support, and membership.

Customer care truly begins by defining who the customer is. Our customer is any person we are providing a service to. This can be the GreenStar management team supporting the sales, administrative, or support personnel. This can be sales, administrative, or support personnel providing services to our membership. This can be our membership, sales, administrative, or support personnel providing services to our current or future customers. These are just a few examples – our customer is You!

It is more important that we make an emotional connection with our customer, rather than quickly going through a memorized script and getting them off the phone.

Customer care begins with the very first phone call, or knock on the door where we are entering the home and mind of a prospective customer, or repeat customer. It is extremely important that in the first fifteen seconds that we influence our prospective or repeat customer in a positive light. The customer will be influenced by:

- the way we greet,
- identify ourselves,
- our tonality,
- upbeat and positive attitude,
- pleasant and business like voice

When our initial message is presented with a smile on our faces in the most professional and positive manner we can put forward, it reflects the best in each individual AND the company. Our objective is to bond with each customer, get the customer involved by educating them about the system, components, and/or services they are purchasing.

When interacting with our customer, we want them to have a happy experience. We do this by making a personal and emotional connection. We continue to build rapport while addressing unstated needs.

This is the foundation of our customer care program. It is extremely intuitive and you must always put your best foot forward for the service of the customer. In sections that follow you shall discover resources and other recommendations on enhancing your customer care skills.

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## Exhibit A – Quality Assurance and Control Points



### Exhibit A – Quality Assurance and Control Points

The following contains references, examples, and links to some of the best quality assurance and control systems known in the HVACR industry.

The basic components of providing quality on each job is to be consistent. It is much easier to make corrections to someone who consistently makes small errors, than the random wildcat who misses here and there. Here are a few tips:

1. Bring the correct and proper tools
2. Perform a discovery inspection
3. Communicate openly and transparently with the customer.

#### INDUSTRY REFERENCES YOU NEED TO KNOW:

EnergyStar – <https://www.energystar.gov/>

Air Conditioning Contractors of America (ACCA) – <http://www.acca.org>

American Society of Heating and Air-Conditioning Engineers (ASHAE) – <https://www.ashrae.org>

#### HYPERLINKS TO THE HVACR INDUSTRY BEST PRACTICES:

[EnergyStar Quality and Value Program](#)

[PDF] [EnergyStar Quality Installation](#) – a sponsor guide

[EnergyStar How to Develop a Local Program](#)

[Quality Assurance Procedures | ENERGY STAR](#)

[PDF] [Quality Improvement Survey - Energy Star](#)

[PDF] [HVAC Quality Installation Specification \(ACCA Standard 5\)](#)

This link below is a must read for every installer – there are premium examples and takeaways in addition to some very detailed checklists

[PDF] [HVAC System Quality Installation Rater Checklist Guidebook](#)

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## Exhibit A – Quality Assurance and Control Points



### THE PROFESSIONAL HVAC INSTALLER AND/OR TECHNICIAN

Most people like the sound of a title that includes the word “Professional” – and it should be something you like and are proud to carry. You put in a lot of study time in the books, with a mentor or trainer, and in the field learning as you had to do all the little odd jobs, or what some would call the “dirty work” to get where you are today. GreenStar has very few requirements of the professionals that work with them. The short list below is a small portion of what you either know, or are learning. So listen up and read carefully because you, your customer, and your help could be put in harm’s way if any of these points are not taken seriously:

1. As a professional installer and/or technician, you have an obligation to know the product better than the customer. This includes all safety precautions and related items.
2. Prior to actual installation, thoroughly familiarize yourself with the guidelines contained with the equipment, materials, or components you are working with.
3. Pay special attention to all safety warnings posted on the equipment. Often during installation or repair it is possible to place yourself in a position which is more hazardous than when the unit is in operation.
4. Remember it is your responsibility to install the product safely and to know it well enough to be able to instruct the customer in the safe operation and use.
5. Safety is a matter of common sense...a matter of thinking before acting. Most manufacturers have a list of specific good or best safety practices...follow them.
6. The precautions listed in the technical publications are found as supplemental information to the existing installation and operation manual practices. Always err on the side of safety.
7. Remember, it is always your responsibility to know the local building codes and adhere to them. It is also your responsibility to make sure you have the proper documentation for the work being performed.
8. Always follow a proven mechanical inspection checklist, and/or the manufacturer quality installation guidelines.
9. Properly document your installation by taking before and after photos. Add descriptions or journal notes where it may be necessary to provide clarifications.
10. Last yet not least, always confirm the equipment received from the manufacturer matches the equipment on the technical drawings and/or purchase order.



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## Exhibit B – Customer Care Points



### Exhibit B – Customer Care Points

Practice, practice, practice, all the important customer skills you can learn matter. The skills that will be discussed below are based on years of experience and dedication to providing customers the best that can be offered. The information provided below is to help each person who wants to grow and improve. They are examples that can be leveraged, practiced, and applied in various circumstances. Use your best judgment based on your experience. Most people are bad at what they do when they first start, yet after much practice they become the de facto experts of the time.

#### PATIENCE

You will encounter customers who are stumped and frustrated, angry even. It is important that you take the time to listen and truly figure out what they want. Never interrupt, always allow the customer to finish. Always ask if there might be anything else. Then repeat what you heard and get confirmation before going on. Here is a simple example:

Mrs. Smith calls because the last service technician left a mess on her floor when they came out to give an estimate. The technician was quick to assess the situation and never asked Mrs. Smith any questions to see what was important.

*GSA: Hello this is GreenStar how can we help you today?*

*Mrs. Smith: I need an estimate on replacing our air conditioning.*

*GSA: May I ask who I have the privilege of speaking to?*

*Mrs. Smith: Mrs. Smith, only that's not important right now I need my air conditioning fixed!*

*GSA: Yes, we can help you Mrs. Smith. Have you had anyone look at your system already?*

*Mrs. Smith: Yes, and they did not even listen to me to see what I wanted – then Mrs. Smith continued to unravel the encounter she had with that technician and her frustration.*

*GSA: If you would Mrs. Smith, please let me know what you are experiencing and what you would like to see GSA do for you.*

As you see, your focus is to listen intently to what Mrs. Smith is saying, and what she is NOT saying. First you repeat in a question like manner those items she expressed as important, then with the experience gained, or coaching cheat sheet provided, you shall address those unstated needs that Mrs. Smith may be overlooking. You do this while building rapport and remaining very patient. As long as you remain focused on Mrs. Smith, keep a smile on your face, you will build rapport.

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## Exhibit B – Customer Care Points



### ATTENTIVENESS

We touched briefly on the importance of really listening to the customer you have on the phone or directly in front of you. This is crucial for providing great service for numerous reasons.

Not only is it important to pay attention to individual customer interactions (watching the language/terms that they use to describe their problems), but it's also important to be mindful and attentive to the feedback that you receive at large.

A really important question to have an answer for is "What are your customers telling you without saying it?"

Be sure to relay the important points clearly to your customer, keep it simple with nothing to doubt. Be sure to get to the customers' needs quickly; the customer does not need to hear a story about the company or you or how the day is going.

Always repeat what you heard with the same descriptions used by the customer. Make sure you are clear and use the same syntax. Syntax is very important. You can have the exact same words used in a different syntax and it takes on a very different meaning. For instance: Johnny bit the dog vs the dog bit Johnny – it becomes a very different experience, especially for Johnny.

### PATIENCE

Not only is patience important to customers, who often reach out to support when they are confused and frustrated, but it's also important to the business at large. As you will soon learn if you have not experienced it already, great service beats fast service every single time. It may not be inexpensive to do a job once, AND to do it right. Yet it is extremely expensive when you have to rework, fix, replace, or repair a job thrown together with haste. The same goes with having patience with your customers. They may not always understand what you are doing and why. The important aspect to consider is that you must help your customer understand and trust that you have their best interests at heart. You must also help them understand that you must stay focused on the task at hand so you can provide them with the quality work they desire and expect...and ultimately pay for.

### CLEAR COMMUNICATION SKILLS

Make sure you're getting to the problem at hand quickly; customers don't need your life story or to hear about how your day is going. Introduce yourself with your first and last name along with the company you represent along. State the purpose of your visit, and then listen to the customer to confirm they are in agreement.

It is very important that you be complete aware of your communication habits. You need to be cautious about how some of your communication habits translate to customers,

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## Exhibit B – Customer Care Points



and it's best to err on the side of caution whenever you find yourself questioning a situation. Automatically take full responsibility if the customer appears genuinely disturbed, because in most cases it is due to a misunderstanding from communication. Quickly evaluate the situation, and let the customer know you genuinely care about their concerns, and will do whatever it takes to make sure they are satisfied. If needed, call someone at the company who is good at talking to customers and explain the situation so you can return your focus to completing the job so the customer can be happy with those results.

### KNOWLEDGE OF THE PRODUCT

The best forward-facing employees in your company will work on having a deep knowledge of the product benefits the customer, and secondly how your product works.

It's not that every single team member should be able to build your product from scratch, but rather they should know the ins and outs of how your product works, just like a customer who uses it every day would.

Without knowing your product from front-to-back, you won't know how to help customers when they run into problems or have questions. Be sure to keep a resource list of names for those people who specialize in different areas within the HVACR industry. You may have a person in single home residential systems for different climate zones; another for clean comfort indoor air essentials; another for light commercial, and so on.

### ABILITY TO USE "POSITIVE LANGUAGE"

Sounds like pho-pho nonsense, it is not. By practicing you can gain the ability to make minor changes in your conversational patterns to truly go a long way in creating thrilled customers.

Language is a very important part of persuasion, and people (especially customers) create perceptions about you and your company based off of the language that you and your associates use.

### ACTING SKILLS

Sometimes you're going to come across people that you'll never be able to make happy.

Situations outside of your control (they had a terrible day, or they are just a natural-born complainer) will sometimes creep into your usual support routine, and you'll be greeted with those barnacle-like customers that seem to want nothing more than to pull you down on their level. What's that, you call that a smile!

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## Exhibit B – Customer Care Points



Every great customer service representative will have those basic acting skills necessary to maintain their usual cheery persona in spite of dealing with people who may be just plain grumpy.

### TIME MANAGEMENT SKILLS

Despite the many reasons on why you should spend more time with customers, the bottom line is there will always be a limit. In your quest to keep your customer delighted with your products and or services, you also need to be concerned with achieving what the customers want in an efficient manner.

The trick here is that this should also be applied when realizing when you simply cannot help a customer. If you don't know the solution to a problem, the best kind of support member will get a customer over to someone who does.

Don't waste time trying to go above and beyond for a customer in an area where you will just end up wasting both of your time!

### ABILITY TO "READ" CUSTOMERS

You won't always be able to see customers face-to-face, and in many instances (nowadays) you won't even hear a customer's voice!

That doesn't exempt you from understanding some basic principles of behavioral psychology and being able to "read" the customer's current emotional state.

This is an important part of the personalization process as well, because it takes knowing your customers to create a personal experience for them.

More importantly though, this skill is essential because you don't want to mis-read a customer and end up losing them due to confusion and miscommunication.

Look and listen for subtle clues about their current mood, patience level, personality, etc., and you'll go far in keeping your customer interactions positive.

### A CALMING PRESENCE

The best customer service reps know that they cannot let a heated customer force them to lose their cool; in fact, it is their job to try to be the "rock" for a customer who thinks the world is falling down due to their current problem. It is a good practice to keep a small mirror on your desk. This way you can monitor your own facial expressions. Make sure that you have a smile, even if you have to force one. Stand up if needed and take a deep breath of air. This method is great for producing an instant calming effect.

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## Exhibit B – Customer Care Points



### GOAL ORIENTED FOCUS

This may seem like a strange thing to list as a customer service skill, but I assure you that it is vitally important. You would be wise to create a simple goal list that you want to achieve with each and every customer. Here are some examples:

- Stay happy and positive during the call
- Listen intently to discover the customer likes and dislikes
- Always ask to make sure the customer is happy
- Always start out providing the customer with the best we can offer

### ABILITY TO HANDLE SURPRISES

Sometimes the customer support world is going to throw you a curveball. Maybe the problem you encounter isn't specifically covered in the company's guidelines, or maybe the customer isn't reacting how you thought they would. Whatever the case, it's best to be able to think on your feet...so to speak. As your company matures, you can create guidelines for yourself in these sorts of situations.

Let's say, for instance, you want to come up with a quick system for when you come across a customer who has a product problem you've never seen before...

Who? The one thing you can decide right off is who you should consider your "go-to" person when you don't know what to do. The CEO or COO might be able to help you, and yet you can't go to them with every single question! Define a logical chain for yourself to use, then you won't be left wondering who you should forward the problem too.

What? When the problem is noticeably out of your hands, what are you going to send to the people above? The full conversation, just the important parts, or maybe some highlights and an example of a similar ticket?

How? When it comes time to get someone else involved, how are you going to contact them? For instance, at GSA uses a service we prefer to solve small dilemmas over chat, and save bigger problems for email or conference calls, keeping inbox clutter down to a minimum.

### PERSUASION SKILLS

It's not about making a sales pitch in each email, but it is about keeping your customers happy and not letting potential customers slip away because you couldn't create a compelling message that your company's product is worth purchasing!

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## Exhibit B – Customer Care Points



### TENACITY

Remembering that your customers are people too, and knowing that putting in the extra effort will come back to you ten-fold should be your driving motivation to never "cheat" your customers with lazy service.

### CLOSING ABILITY

Your willingness to do this shows the customer 3 very important things:

- That you care about getting it right
- That you're willing to keep going until you get it right
- That the customer is the one who determines what "right" is.

### WILLINGNESS TO LEARN

If you came across this article and read all the way to the bottom, you likely already have this skill (nice job!).

This is probably the most general skill on the list, but it's still necessary.

Those who don't seek to improve what they do, whether it's building products, marketing businesses, or helping customers, will get left behind by the people willing to invest in their skills.

### LINKS TO CONSIDER

[TED Talks](#) – Ideas Worth Spreading

[How Great Leaders Inspire Action](#) – Simon Sinek

[Pitch Mastery](#) – By Oren Klaff

[The Lies About Multitasking](#) – Dave Crenshaw

[The Power of Believing That You Can Improve](#) – Carol Dweck

### BOOKS TO CONSIDER

[The Greatest Salesman in the World](#) – Og Mandino

The Power of Habit: Why We Do What We Do – Charles Duhigg

The 10X Rule – Grant Cardone

Pitch Anything: The Method for Presenting, Persuading, & Winning the Deal – Oren Klaff

The Code of the Extraordinary Mind – Vishen Lakhiani

Grit: The Power of Passion and Perseverance – Angela Duckworth

The Power of Consistency – Weldon Long