

# Mechanical Service Professional (MSP) Program

#801-18



January 18 - December 11, 2018 (meets monthly)  
12:00 - 4:00 pm

*presented by*



**Mechanical Contractors Association**  
WESTERN WASHINGTON

## What is the MSP Program?

The MSP program is a flexible, multi-module program designed to meet the needs of the many different Service roles in MCAWW member firms. The program consists of **12 modules**. Completing at least 9 of the 12 modules earns the **MSP Certificate**. Participants who complete all 12 modules will receive an **Enhanced MSP Certificate**.



## What Purpose does the MSP Program Serve?

While the Mechanical Service Contractors Association (MSCA) offers many outstanding educational programs, the MCAWW Mechanical Service Professional (MSP) program has been designed to provide local, quality training that is relevant to our marketplace. Participants have the opportunity to acquire knowledge and skills that might take years to learn on the job, in an environment where they can safely experiment and make mistakes. The program has been designed to accommodate the wide variability in job descriptions within our member firms' Service departments.

By providing best practices and generic processes that can be customized and implemented strategically within member firms, this program will ultimately benefit the industry as a whole.

## Who Should Attend?

No matter what role one may have in the broad category of Service, the MCAWW Mechanical Service Professional (MSP) program is designed to meet individual educational needs. The course applies to anyone in a service role, whether in the field or the office. From Project Managers to Account Managers, Field Supervisors to Lead Technicians, Operations Managers and even Billing, Dispatchers and coordinators, all will benefit from this program.

The MSP program is a highly interactive, competency-based program with a strong emphasis on practical application of knowledge. Participants will gain valuable information and tools, without being required to share proprietary information from their firms.

## Where are Classes Held?

All classes will take place at MCAWW's Training Center, located at 1100 Olive Way, Suite 1250, Seattle, WA. **Space is limited to 20 participants.**

## When are Classes Scheduled?

Each module runs 12:00 - 4:00 pm. Classes are scheduled as follows\*:

DATE	TOPIC	INSTRUCTORS
January 18, 2018	The Mechanical Service Industry	Rich Happel & Panel
February 6, 2018	Putting Communication to Work	Gary Polain
March 22, 2018	Successful Labor Relations	Ed Kommers
April 26, 2018	Service Agreements, Maintenance Contracts and Customer Needs	Rich Happel
May 16, 2018	The Heart of the System - HVAC Equipment	Rory Olson, Seth LaRiviere
June 20, 2018	Developing Safety as a Culture	Steve Merkel
July 12, 2018	Financials for Service - <i>It is Different Than Construction</i>	Leah Gutmann
August 22, 2018	Estimating Service Projects Successfully	Danny Dallum
September 13, 2018	Matching Sales Techniques to Strategies	Bob Frey
October 16, 2018	Customer Service - The Whole Team!	Gene Timmons
November 7, 2018	Plumbing & Controls Service Opportunities	Rory Olson, Seth LaRiviere
December 11, 2018	Getting Things Done in a Fast-Paced Environment	Ed Kommers

*\*MCAWW will make every effort to follow the published schedule, but reserves the right to make modifications if necessary.*

*See next pages for a detailed description of classes*

### To Register:

Complete the registration form and submit to MCAWW no later than December 18, 2017. Candidates will be notified of their acceptance by December 22, 2017. Payment is due upon acceptance into the program.

### Cost:

\$1,000 (includes all class materials and lunch for each session)

# TOPICS:

## **THE MECHANICAL SERVICE INDUSTRY**

- Gain a general understanding of the mechanical contracting business and discuss the key differences between construction and service. Identify how the two divisions feed and complement each other.
- Review the basic foundations of a service business model including typical organizational structures, profit centers, and business strategies. Learn the keys to understanding the mechanical service business model as it pertains to target markets and menu of services offered.
- Discuss types of services work and how they come together to integrate company culture, client needs, and build long lasting relationships to increase overall company profitability.
- Understand the unique challenges and opportunities in the service business and how current trends and economic conditions affect a company's approach to service.

## **PUTTING COMMUNICATION TO WORK**

- Identify your own personal communications style as well as the communications styles of others.
- Learn how to adapt your style to better communicate with others.
- Explore the appropriate use of various methods of communication.
- Gain techniques that will enhance sales and business relationships with internal and external customers.

## **DEVELOPING SAFETY AS A CULTURE**

- Understand the unique safety risks of the service industry and how they can affect estimating, pricing, scheduling, and sales.
- Identify site specific hazards for field technicians and how to address on-site client safety concerns.
- Learn how to build an effective safety culture.
- Review and address safety situations specific to service.
- Establish best practices and effective methods for technician safety awareness and engagement including weekly safety talks, policies, and procedures.



## TOPICS *(continued)*

### **CUSTOMER SERVICE - THE WHOLE TEAM!**

- Gain a clear understanding of roles, responsibilities and the importance of teamwork in delivering a positive overall client experience.
- Learn how to be proactive in client services and how to effectively ask for and obtain meaningful customer feedback.
- Understand how good customer service creates value as a commodity and affects sales, profitability, and long term growth.
- Learn techniques to increase customer satisfaction and service within your organization.
- Discuss the difference between selling and serving clients and explore different customer service models and methods.

### **FINANCIALS FOR SERVICE - IT IS DIFFERENT THAN CONSTRUCTION**

- Understand the different financial models used in the service divisions vs. construction.
- Review key benchmarks used in mechanical service and how key performance indicators (KPIs) are used to measure the health of an organization and help establish business strategies.
- Identify causes of service profit killers for various types of service work and contracts.
- Learn about the real cost of an hour of labor, associated costing/ billing inefficiencies, and how the field technician impacts financial outcomes.
- Learn methods to improve the financial performance of a service division.

### **GETTING THINGS DONE IN A FAST-PACED SERVICE ENVIRONMENT**

- Obtain skills to get and stay organized and explore techniques to manage your time.
- Learn how to identify the most important things work on and how to prioritize your To Do list.
- Understand how to identify what and how to delegate.
- Learn how to be proactive in managing work to stay focused and be able to manage deadlines.
- Explore methods to handle multiple interruptions during the day.
- Practice “getting it all out of your head.”

## TOPICS *(continued)*

### **SUCCESSFUL LABOR RELATIONS**

- Understand the challenges of the unique relationship of service field technicians with long-term clients.
- Understand how to match client needs with collective bargaining agreements.
- Gain a general understanding of the collective bargaining agreements that apply to service in our area.
- Practice applying solutions to typical labor scenarios.

### **SERVICE AGREEMENTS, MAINTENANCE CONTRACTS AND CUSTOMER NEEDS**

- Discuss the many different names for a “Service Agreement.”
- Understand basic components of a typical “Service Agreement.”
- Review the different types of “Service Agreements.”
- Review master agreements and the “one page proposal.”
- Review pricing methods and strategies for different types of contracts.
- Discuss different facility types/applications and “Service Agreement” impacts.
- Understand the difference between proactive service, reactive service, and preventative service.

### **THE HEART OF THE SYSTEM - HVAC EQUIPMENT**

- Gain a basic understanding of HVAC equipment and systems used in mechanical service.
- Learn best methods and practices for diagnosis, repair, demand service, and maintenance of equipment and systems. Understand the need for overall systems skills for field technicians.
- Discuss options for getting assistance from internal and external sources. Review factory training requirements, code compliance, and rebates.
- Understand how to benchmark building performance and how to improve it.



## TOPICS *(continued)*



### **PLUMBING AND CONTROLS SERVICE OPPORTUNITIES**

- Gain a basic understanding of additional equipment and systems used in mechanical service including plumbing, controls, etc.
- Learn best methods and practices for diagnosis, repair, demand service, and maintenance of equipment and systems. Understand the need for overall systems skills for field technicians.
- Discuss options for getting assistance from internal and external sources. Review factory training requirements, code compliance, and rebates.
- Understand how to benchmark building performance and how to improve it.

### **ESTIMATING SERVICE PROJECTS SUCCESSFULLY**

- Understand the cost structure and components of a service project and analysis of risk.
- Review pricing methods and strategies for emergency/on demand, repair work and small projects.
- Gain knowledge on typical service estimating departments and how the estimating process flows through the organization from the initial request to execution for different types of service work.
- Review methods used for estimating different mechanical systems and recognize when a service project requires additional resources.

### **MATCHING SALES TECHNIQUES TO STRATEGIES**

- Gain knowledge on the intangibles of service sales and how to create value in service to an identified target client. Learn how to identify who you are selling to within the client's organization.
- Identify sales roles and responsibilities in the organization and how both the sales team and technicians play a part in the sales process.
- Learn how to identify sales opportunities, qualify leads and set realistic goals and objectives.
- Review the service sales process and different selling techniques, including consultative selling, SPIN, account planning, opportunity planning, and all call planning.
- Review strategies to land new clients and expand services offered to existing clients.

**MCAWW Service Committee:**

Rich Happel (Chair)  
University Mechanical Contractors, Inc.  
John Payne (Vice-Chair), Auburn Mechanical  
Bob Frey, University Mechanical Contractors, Inc.  
Jennifer Koch, McKinstry Co.  
Rory Olson, MacDonald-Miller Facility Solutions  
Gene Timmons, Enviromech

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**MCA of Western Washington**

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*MCAWW educational programs are open to Western Washington  
Mechanical Contracting Industry Improvement Fund contributors*

**REGISTRATION FORM**  
**MECHANICAL SERVICE PROFESSIONAL (MSP) #801-18**  
*all fields are required; incomplete applications will not be processed*

**Contact Information**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Firm: \_\_\_\_\_ Email: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

**Experience**

Number of Years in the Mechanical Service Industry: \_\_\_\_\_ Number of Years in Your Current Role: \_\_\_\_\_

Education: \_\_\_\_\_

Check here if you require special accommodations under the American with Disabilities Act.

Check here to opt in to the MCAWW E-newsletter and stay current on all upcoming classes and events.

Indicate if you have dietary restrictions or food allergies: \_\_\_\_\_

**Supervisor Contact Information**

Name: \_\_\_\_\_ Email: \_\_\_\_\_

I am available for all classes **or** list known exceptions: \_\_\_\_\_

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**Registration Instructions:**

1. Submit this completed form via email, mail or fax (see contact information below).
2. Applications must be received by **December 18, 2017**.
3. Class size is limited; number of attendees per firm may be limited.
4. You will be notified of your acceptance into the program by **December 22, 2017**.
5. Upon notification of your acceptance into the program, you will receive an invoice for payment.

**Registration Deadline: December 18, 2017**

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<p><b>Via Fax</b> (206) 442-9364 Attn: Tamara Butler</p>	<p><b>Via Mail</b> MCA of Western Washington 1100 Olive Way, Suite 1250 Seattle WA 98101</p>	<p><b>Via Email</b> tbutler@mcaww.net</p>
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For questions, please contact Tamara Butler at 206-442-9029 or via email tbutler@mcaww.net

*MCA of Western Washington occasionally videotapes, records or photographs events for the purpose of responsibly promoting the association and/or attendance at future events. By registering for this event you agree to allow us to use your name and likeness for such purposes.*