



Service Provider Checklist

**9 THINGS YOU
SHOULD REQUIRE
FROM YOUR HVAC
SERVICE PROVIDER**

Whether you already have an HVAC service provider, or if you're looking for an HVAC resource, these nine things should be considered non-negotiable when working with a service provider. If the service provider you use is not consistently meeting these requirements, it might be time to look elsewhere.



1: SAFETY

A culture that promotes safe job sites and safety training for technicians and trade craftspeople should be represented in all aspects of your service provider's interactions.



2: APPROPRIATE RESPONSE TIME

- Service calls (1-8 hours): service calls should be responded to the same day, no exceptions. Whether morning or evening, your service provider should have the resources to dispatch a technician within a four-hour window, to analyze and hopefully fix the problem.
- Repairs (24 hours): There are special circumstances that can dictate the repair timing (for example, lead time on parts), but in most situations, repairs should be made the same or next day from when the repair request was logged.
- Request for proposals (Average 5 days): There can be a lot of layers to a proposal; subcontracts, equipment suppliers, permitting, etc. that dictate the response time. In general, you should be receiving proposals from your service provider on an average of five days or less. Depending on complexity, some proposals may only take a day, others may take two weeks.
- Response to questions/general requests (Immediately): You pay your service provider to take care of your equipment so your facility can function. In general, you should feel like you are being cared for, meaning responses to your calls and questions should be almost immediate.



3: EMERGENCY AND AFTER-HOURS SERVICE CALLS RARELY NECESSARY

A service company that values quality preventive maintenance will improve your equipment's operation in a way that significantly reduces and virtually eliminates an emergency need. Emergency and after-hours calls should never be a regular occurrence, and if they are, your provider is not performing the required preventive maintenance.



4: RECURRING PROBLEMS AND REPEATED CALLS ARE THE EXCEPTION

You should be able to trust the people who work on your equipment. If your current provider is coming back over and over to make repairs on the same piece of equipment, it's time to question the overall ability of that company to care for your systems. Requesting repairs for the same problem, or being forced to have the technician return due to an unsuccessful repair, should almost never happen. If it happens with any level of frequency, your service provider is not serving you well, and you should consider finding a different provider.



5: YOU GET A REAL PERSON ON THE PHONE

When you call to request service on your equipment, it's typically an emergency. Speaking with a live person on the other end of the phone ensures all the proper information is gathered up front, so the response can happen quickly, efficiently, and thoroughly. Phone menus and automated answering services are usually only helpful for the service provider, not the customer.



6: PROFESSIONALISM IS A GIVEN

In all aspects, whether language, appearance, vehicles, or tools, your service company should represent itself in a respectful and professional way.



7: EXPERT RECOMMENDATIONS TO SAVE MONEY AND IMPROVE COMFORT

You should be able to rely on your service provider to bring you regular recommendations on ways to reduce maintenance costs, improve comfort and reduce the overall amount of time you have to spend thinking about your equipment. If you find yourself having to be the expert on your HVAC equipment and building automation systems, there is a problem with your provider. The goal of having a reliable service provider is your peace of mind, knowing the experts are monitoring and maintaining your equipment, so you can focus on your business.



8: CONSISTENCY IN EVERY AREA

In every way that your provider interacts with your company—technician dispatch, work ethic, response time, quality of work, and accounting—you should expect and require consistency. A primary technician should be assigned to your site to be familiar with your equipment, processes and procedures. Accounting should be set up so the right contact at your location receives the correct information in a timely manner. You shouldn't be expected to spend time re-educating a new technician every time you call.



9: YOU TRUST THE PROVIDER

In all of the above items, there should be a baseline of trust. This includes trust that your provider is doing the stated work, fulfilling the obligations of a contract, arriving on time, billing for honest work, and not billing for work like call-backs and technician training, as well as communicating with you when issues arise. If you have uncertainty, it's time to look for another provider.

REMEMBER, PROPER HVAC MAINTENANCE CAN SAVE 10-30% OF ENERGY USAGE.

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