

13 Questions Every Facility Manager Should Ask Before Hiring an HVAC Service Provider



Introduction

The number 13 is traditionally viewed as unlucky. But in the world of HVAC, it can be a real benefit to you. That's because 13 key questions can help you, as a commercial facility manager, understand which vendor is best qualified to handle your national HVAC maintenance and repair requirements.

When it comes to managing HVAC at multiple locations, choosing the right HVAC vendor is one of the most crucial decisions you'll make. The right service provider will save you time, headaches and of course, money. Lots of money. The wrong vendor? Well, the costs add up quickly.

The next time you are searching for the right company to handle your national HVAC maintenance and repairs, we hope that you'll keep CLS in mind. Regardless though, we encourage you to ask these 13 questions of any potential new vendor before you make the switch.

As with all our e-books, we welcome your feedback and questions. Please do not hesitate to contact us at 800-548-3542.





About CLS:

With experience dating back to our founding in 1970, CLS has proven to be a leader within the facility services industry. Our service providers are ready to help with facility maintenance whenever you require the support, from complete project implementation to everyday repairs. We offer in-depth help to facility managers for the most significant and costly areas of concern.

We invite you to learn more about our industry-leading facility maintenance solutions by visiting our website at www.clsfacilityservices.com or calling us any time at 800-548-3542.

1 How long have you been in business?

For businesses of every size, scale and function, there's so much riding on the smooth operation of your HVAC units. The company that maintains them should have a depth and breadth of experience over years – decades preferably. Someone new to the business may be able to provide adequate service. But like anything, experience in the HVAC realm matters.

2 Who are your current customers?

Potential clients like you should know about other customers served by this provider. What types of businesses do they operate? Retail? Office? Industrial? Multifamily? How many locations do those customers own? What's the average size of their facilities? Where in the country are they located? And what specific services (e.g., preventive maintenance, repair or replacement) have these customers outsourced to this provider?

3 What services do you provide?

Ideally, that list should include every service needed to keep HVAC units running smoothly throughout the year, from comprehensive preventive maintenance (PM) planning and implementation to troubleshooting, repair and replacement.

Along with services, it is important to ask what types of equipment has this service provider worked on in the past? Make sure that they have the experience to handle your portfolio of equipment. It should also include a full range of administration and support services and tools to ensure accurate, timely reporting to you. Those services and tools should be designed to help you easily track HVAC expenses so that you can stay within your budget.



4 How long have you been delivering each of those services?

This may seem similar to Question #1, but it goes deeper. Some companies (actually, we've found quite a few through the years) will list a variety of HVAC services that they offer. In reality, though, their greatest strength may lie in delivering one or two key services, while they only have limited experience delivering other services that they list.

For example, they may say they offer HVAC project management; but in reality, they have only completed a few projects that were much smaller in size and scale than what you require.

5 Who are your internal experts who can assist me with each of the services that you provide?

For example, do you have an in-house HVAC technician that I can talk to when I need to, as opposed to someone from customer service? Providing HVAC maintenance, repair and replacement at dozens, hundreds or even thousands of locations is a complex task, and an enormous responsibility. The vendor you delegate to handle this must have in-house experts that you can call on when you need technical information – whether it's for a simple question, a routine issue, or an emergency.

6 What is your quoting process?

It's a simple question: "Tell me how your quote process works. From the time I call you, to the time I get the quote in my hand, what happens in your company?" This will lead the discussion to a very different level, and will be extremely insightful into the company's internal operations.



7 What is your current quote approval percentage?

Quote approvals are votes of confidence; statements of trust. In the HVAC realm, you can always find a cheaper quote. But if eight out of 10 times, a customer approves a vendor's quote, then that speaks volumes about the level of trust that vendor has established with the customer.

8 How do you as the vendor evaluate the accuracy of the quote – i.e., the amount of time for the labor, and the price for the material?

National HVAC providers subcontract work in most markets they serve. Its how the business operates. For example, if one of your stores in Tuscaloosa, Alabama is warm and getting warmer by the minute, a national HVAC vendor will dispatch a technician who will then issue a quote back to the National Service Provider to fix the problem. If he estimates six hours of labor to replace a compressor, who in the service provider's company is validating that quote before it is sent to you? The technician said a replacement compressor would cost \$2,000 as the material expense; is it really a \$2,000 compressor, or is it a \$1,500 compressor?

As the customer, you want to make sure you're getting the right labor and material at the right price. It's essential, therefore, to know precisely what the national HVAC vendor you hire does to "watch your back" in all HVAC-related matters. A HVAC technical person should be reviewing all quotes from a third party contractor, prior to passing it along to the customer.

9 Who will be responsible for my account?

Who is the key go-to person at your company? Many national HVAC vendors assign customer service representatives to this role. Customer service reps do well taking work orders and processing them. But when you have an issue you feel needs escalated, many times the service rep needs additional assistance.

A higher level of service results from a provider who assigns a business manager to each customer – a sales-oriented professional who is adept at negotiation and understanding your business. A business manager's job is to intercede before issues and problems arise, view those problems from the customer perspective, gather facts, make sense of it all, and work with the customer to resolve the issue.

10 What types of reports can I expect to receive from your company?

If you as a customer award a national vendor 500 stores, your spend on HVAC management is significant. So what kind of reporting does that vendor provide? What types of reports are available to you? Do you as the customer have the flexibility to decide? For example, do you want to know dollars spent on preventive maintenance (PM) versus repairs? The PM to TM ratio? (meaning for every dollar spent on preventive maintenance, how many dollars do I spend on repairs.) What about the age, make and model of each piece of equipment; is knowing that important to you? In a larger sense, are the reports they generate valuable and actionable, or do they simply report dollars spent.

We think strategic reporting – and proper analysis of facts and figures – is essential. A proprietary management system like CLS Facility Services' PM Logic® provides comprehensive reporting that is ideal for national HVAC management. We believe it's the standard by which any national reporting system should be measured. Check it out on our website and then see how another vendor's reporting system stacks up.



11 How are your service calls handled?

Recall a recent problem with one of your locations. Ask the provider in question how they handle such emergencies, and to follow it through to resolution. Ask them to take you through the steps that they follow, from start to finish when responding to your needs.

When the Tuscaloosa store we mentioned earlier is heating up fast and you call that vendor, what happens next? Do you ask for anyone in particular, or are you connected with whoever is available? What is their response time for emergency service? How quickly can you expect them to arrive on site for a regular call? Will they call in advance to let you know the status of the technician?

12 Do your customer service representatives work out of your office, or are they remote?

Many remote customer service representatives work from home. As a result, they're subject to a variety of potential home-related distractions during the day, and sometimes, those distractions can occur when customer issues arise. Conversely, office-based customer service representatives are focused solely on delivering customer service from the centralized office in which they work, and have the support and technical advice right at their side.

13 Do you have a scorecard system for your vendors?

The vendor you hire will subcontract work for each of your facility requirements around the country. So how do they evaluate the technicians that they hire to work in your facilities? What kind of scorecard system do they use for them? The technician that's being sent to your Tuscaloosa store is a mystery to you; as a national facilities manager, how does your HVAC vendor make sure that he or she is sending you a qualified technician? Is their insurance certificate up to date? Do they even have the proper certificate? Do they have a license? Are they bonded? In short, what's the process to insure the best technicians are serving your stores?



So there they are – 13 questions that can help make a big facilities management decision a little more, well, manageable.

Do our 13 questions spark additional questions of your own? We understand – HVAC is complex. We would value the opportunity to discuss our 13 questions, or yours, in more detail with you. The more information you have, the better equipped you'll be to meet your national HVAC challenges strategically.

If you are interested in learning more about national HVAC services from CLS, call us anytime at 800-548-3542.

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Choosing a facilities solutions partner is a crucial choice for your organization. You want someone who understands your equipment and its needs, someone you can trust and customer service that exceeds your expectations. Learn more about CLS at www.clsfacilityservices.com.

