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VICTORY VENTURES

2026 Q4 PRE-PLANNING SURVEY REPORT

PLANNING MEETING
September 24, 2026

RESPONSES
33

CONFIDENTIALITY
No names. Answers in random order.

Confidential. Prepared for Victory Ventures' leadership team by Coach.Win.

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Select any line to jump to it.

AT A GLANCE

WHERE THE TEAM STANDS

Victory Ventures came through a record July together, but tired technicians, a broken install handoff and December renewals now compete for the next 90 days.

Peak season pulled the team together through a record July, the truck stock program and the 7:15 dispatch huddle, and eNPS rebounded from last quarter. Fewer answers describe exhaustion than last period, but overtime is still the default plan, and the install handoff keeps breaking. The team is split on one priority: December renewals now lead, ahead of technician retention, the handoff and connecting the CRM and ERP.

ENPS 2026 Q4

+21

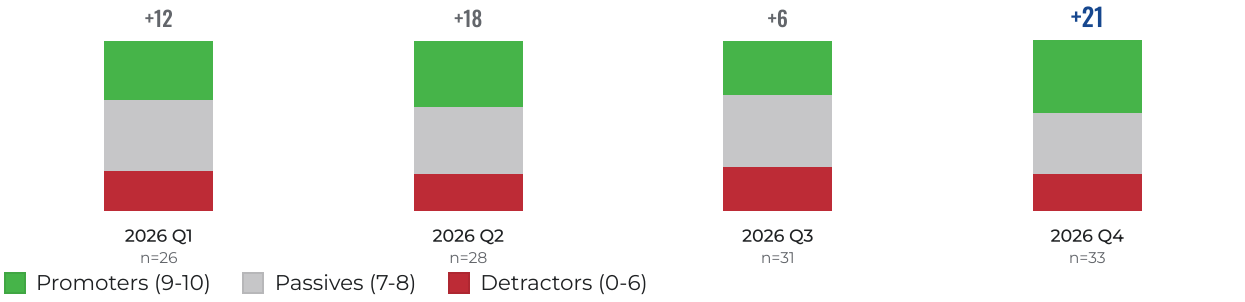
+15 since 2026 Q3. 33 ratings, average 7.8 of 10.

RESPONSES BY PERIOD

26	28	31	33
'26 Q1	'26 Q2	'26 Q3	'26 Q4

Response rate starts with surveys sent from ClearSight.

ENPS OVER TIME



WHAT CHANGED SINCE 2026 Q3

- NEW **Wins:** Record July, peak season held (10 of 33 now, 0 of 31 in 2026 Q3)
- NEW **Wins:** 7:15 dispatch huddle calms mornings (6 of 33 now, 0 of 31 in 2026 Q3)
- FADED **Wins:** 48-hour invoicing speeds receivables (8 of 31 in 2026 Q3, not raised now)
- FADED **Wins:** QBRs with top accounts (7 of 31 in 2026 Q3, not raised now)
- FADED **Wins:** Rooftop PM blitz before heat (6 of 31 in 2026 Q3, not raised now)
- NEW **Start:** Connect CRM and ERP (7 of 33 now, 0 of 31 in 2026 Q3)
- RISING **Start:** Early renewal campaign (5 of 33 now, 0 of 31 in 2026 Q3)
- FADED **Start:** Senior tech pay and retention review (7 of 31 in 2026 Q3, not raised now)

PLAYBOOK

PREPARE FOR THE PLANNING MEETING

Set aside 30 to 45 minutes before the meeting. Read each section's summary, then read every response under it and write your own questions and takeaways in the notes box at the end of the section. The AI found the patterns; your judgment decides what they mean.

Summaries are drafted by AI from the team's confidential answers. Each count is the number of answers that raised a theme, out of the answers to that question; one answer can raise several themes. Trend bars compare the share of answers in each period.

SUGGESTED TOPICS TO DISCUSS

Drafted by AI from the whole report. Reorder, replace or drop them before the meeting.

1 Fix the install handoff

This is the top breakdown in Communication and grew since last period. It also shows up in Focus, Start and Culture, and passives and detractors in eNPS call it broken.

Do we require a signed install scope sheet and a kickoff with the account exec, crew lead and warehouse before any install is scheduled, and who owns it between sales and dispatch?

2 Win December renewals cleanly

Renewals went from almost absent to the largest group in Focus, and Start asks for an early campaign. Communication warns that rate changes reached customers before account managers and billing did.

Who owns the renewal tracker, when do rates get settled and pre-briefed internally, and which unprofitable agreements should not renew at the old rate?

3 End overtime as the plan

Overtime is the top drain in Stop for a second period, and Culture still describes a worn-out team. Focus ties this to the risk of losing more senior technicians before winter.

What caps, rotation, pay review or hiring do we commit to, and what nonessential work do we pause to give people a real recovery stretch in early Q4?

4 Connect the CRM and ERP

It is the top request in Start and new this period. Stop, Focus and eNPS link it to re-keying, billing mismatches and slow invoicing.

Do we fund a 90-day integration starting with install jobs, under one finance owner with a sales partner, and what is the interim fix for double entry?

5 Clean up chat and the drive

Chat channel sprawl and an unowned shared drive are new this period in both Stop and Communication, and an urgent no-heat call got missed in chat. Answers agree on consolidating channels but split on how.

Which channel structure do we adopt, what belongs in chat versus the work-order app and ERP, and who owns the shared drive and its naming rule?

QUESTIONS TO RAISE

PRIORITIES AND ACTION ITEMS

1 PRE-PLANNING WINS

What was your team's or department's most significant achievement in the past 90 days?

KEY TAKEAWAY

Recognize the truck stock program and the 7:15 huddle as the routines that carried the team through peak season, and treat them as the model for fixing the next bottleneck.

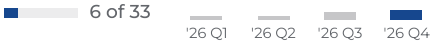
Most answers credit a record July and a peak season where the team met its response commitments, even while short-staffed and running heavy overtime. Several tie that result to new routines: the truck stock program, the 7:15 dispatch huddle, the apprenticeship launch, and QBRs that brought early renewals ahead of December.

Record July, peak season held NEW



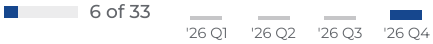
July was the largest revenue month on record, gross margin held, billing and payroll kept pace, and customers got same-day or next-morning emergency service. Answers say this protects December renewals and gives cash to invest going into the slower fall months.

Truck stock lifts first-time fix



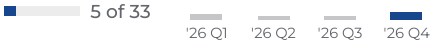
Weekly checks against each truck's stock list ended emergency parts runs and cut return trips. Answers say this lowers cost per call, reduces repeat-visit calls and makes service agreements easier to sell.

7:15 dispatch huddle calms mornings NEW



The huddle gives one shared plan, so schedule changes, late techs and missing parts surface before trucks leave the yard. Answers say it means fewer morning calls, better arrival windows and planned parts pulls.

Apprenticeship and senior tech hires



The August apprenticeship launch and two senior tech hires restored experience lost in May. Answers say this builds a pipeline instead of competing for experienced people against higher-paying competitors.

Raised before, not now: 48-hour invoicing speeds receivables (8 of 31 in 2026 Q3); QBRs with top accounts (7 of 31 in 2026 Q3); Rooftop PM blitz before heat (6 of 31 in 2026 Q3).

WHERE VIEWS DIFFER

One answer says quotes stuck with the estimators let several jobs go cold, so July could have been bigger. Others note that first-time fix gains are uneven because stock lists differ by branch, and that the huddle runs long on Mondays.

What made truck stock and the huddle stick, and which open problem, such as stalled estimator quotes or uneven branch stock lists, should get the same routine next quarter?

EVERY RESPONSE, IN RANDOM ORDER (33)

1. Record July. Sales booked a bunch of replacement work in June that turned into install revenue in July, so the pipline finally showed up in the numbers.
2. Getting through July with the whole team still standing.
3. Everybody says record July but I'd say the quotes waiting on the estimators cost us some of it. We still hit a big number, which is good, but I know of at least three jobs that went cold. The achievement is real, I just think it could have been bigger.
4. Payroll and payables got through the overtime month with no errors, which was not easy. Dozens of hourly employees on split shifts and premium pay, and everyone was paid right and on time.
5. QBR with the school district led to an early renewal.
6. The 7:15 huddle is the thing I hear the most positive feedback about, and it costs us fifteen minutes. A few techs say it runs long on Mondays. Still, days start with one shared plan, dispatch is calmer, and customers get better arrival windows.
7. Launching the technician apprenticeship in August. We have three apprentices and we hired two senior technicians the same month. For twenty years I've watched experienced people leave and the trade get harder to hire for, so building our own bench is the most important long-term move we've made this year. It protects service quality, and it tells the field we invest in people.
8. The truck stock program. I'm finishing more calls on the first visit because the parts I always need are actually on the truck. Fewer return trips for contactors and capacitors, and customers don't have to wait a second day.
9. Since the huddle started I know by 7:30 which trucks need what, so pulling parts is planned rather than panicked. It used to be techs rushing in at 8 with a list. Smaller thing, but it cut a lot of chaos in the warehouse.
10. Collections cleared out most of the 90 day aging balances. Not exciting, but it brought cash in and cleaned up the report.
11. Billing kept up with record July volume. Work orders ran about a third higher than a normal month and we still got most invoices out inside the 48 hour target. That mattered because we were carrying heavy overtime payroll and cash had to come in at the same pace. Collections calls were up too, but aging stayed under control.
12. First-time fix is up, and I'm proud of that, but it isn't evenly spread. Some trucks still run short on the less common items and the lists differ by branch. Still, the overall improvement lowers cost per call and makes the work more predictable.
13. Apprenticeship launch. Gives us something real to say to customers about capacity.
14. Launching the apprenticeship and hiring two senior techs in the same month. We were short on experience after May, and this fills both ends. The senior techs cover complex calls now, and the apprentices give us a pipeline so we aren't just competing for experienced people with a competitor that pays more. It will take a couple of years to fully pay off, but it changes how we staff.

15. We got through peak season. That sounds basic, but between the May departures and the rooftop blitz we went into June stretched thin. The branches covered for each other, dispatch rebalanced routes daily, and we met our response commitments on every maintenance agreement account. The business impact is we protected the December renewals, because customers saw us show up when it was hottest.
16. dispatch huddle means we know which techs are running late or off before customers call asking. way fewer angry calls in the morning
17. My crew finished four school installs in July before the buildings reopened in August. We worked weekends on two of them and the schedule had zero slack. If those had slipped, the district would have had classrooms without cooling for the first weeks of school, and I doubt they'd trust us with the next phase. Everybody stayed safe and nobody cut corners on commissioning.
18. We got the truck stock lists built and restocking on a routine, so every truck is checked weekly against its list. In April it was a mess. Now techs find what they need and we stopped doing emergency parts runs across town. First-time fix is up noticeably, which saves drive time, fuel and overtime, and customers stop calling to ask where the tech is.
19. got a couple of early renewals off the back of QBRs, one clinic group even asked to add more equipment to the agreement. keeps december less scary
20. Having the huddle gives install crews a chance to flag parts and access issues before we leave the yard. We lose a lot less time showing up and finding something missing.
21. Our customer service reps are taking way fewer 'the tech came back again?' calls. That's the truck stock program paying off. Fewer repeat visits means happier accounts and less rework for everybody.
22. Two accounts renewed early after their QBR and one added three buildings to its agreement. A standing meeting shows them we aren't only calling when renewal comes around.
23. Peak season with no major customer escalations.
24. Mornings run smoother now with the 7:15 huddle, I know what's coming.
25. Payroll got the three apprentices and the two new senior techs set up with the right wage scales and onboarding paperwork in August. Small team win, but these hires are how we stop losing capacity to the competition.
26. Warehouse finally did a full cycle count and cleaned out old stock. We found a couple thousand dollars in parts we didn't know we had and cleared a lot of shelf space.
27. survived the july heat. rooftop units were failing left and right and we still got to every emergency call same day or first thing next morning. lots of 12 hour days but customers noticed
28. First-time fix rate went up. Truck stock is the reason.
29. Fewer callbacks from our maintenance customers now that techs are fixing it on the first visit. Easier for me to sell service agreements when the property managers aren't complaining about repeat trips.
30. Getting two experienced techs hired after we lost Sam and another senior guy. I'm not carrying every hard call anymore. The apprentices are keen too, and I enjoy showing them how to read a system.
31. The QBRs have changed my conversations with accounts. Before, I'd hear about problems at renewal time. Now we sit down with the property manager, review response times and open items, and they tell us what they plan for next year. Three accounts expanded scope and one restaurant group renewed early. With most agreements renewing in December, that gives us a solid base of revenue going in.
32. Dispatch huddle at 7:15 means I get fewer one-off phone calls at 7:45. Schedule changes get caught early instead of at noon, and the techs actually hear the plan together.

33. July was the largest revenue month in the company's history, and gross margin held despite the overtime. This matters because it gives us room to invest in the apprenticeship and truck stock without stretching cash going into the slower fall months.

YOUR NOTES ON WINS

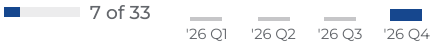
2 PRE-PLANNING START

What is ONE new process, tool, or recurring meeting we should start doing in the next 90 days to improve performance?

> **KEY TAKEAWAY**
> **Commit to a funded 90-day CRM-to-ERP integration for install jobs, owned by one finance leader with a sales partner, starting with a customer list cleanup.**

The team most often wants to connect the CRM and the ERP so a job carries one number from quote to invoice. Close behind are a sales-to-crew kickoff for every install and a 48-hour quote target, and several answers ask for an early December renewal campaign and regular recognition for field techs.

Connect CRM and ERP NEW



A won quote should create the job and customer record so billing stops re-keying scope, pricing and renewal changes. Most suggest starting with install jobs and naming one accountable owner from finance, with sales on the team.

Install kickoff before mobilizing



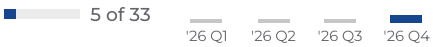
Hold a short kickoff once the PO comes in, with the account exec, crew lead and warehouse, to catch missed scope and long-lead items. Some want a one-page signed handoff form or a weekly Thursday install review.

48-hour quote turnaround



Set a 48-hour target for standard quotes, route requests through the CRM with a due date, and track turnaround on a visible board or at the Monday all-hands. Several also want estimating software to replace the spreadsheet.

Early renewal campaign RISING



Customer Success should own a renewal tracker for the December maintenance agreements now, with weekly status checks, calls to every customer, and letters at 90, 60 and 30 days. One answer adds a finance margin review so unprofitable agreements are not renewed at the old rate.

Raised before, not now: Senior tech pay and retention review (7 of 31 in 2026 Q3); Structured ride-alongs for new techs (7 of 31 in 2026 Q3); Daily 15-minute dispatch huddle (6 of 31 in 2026 Q3).

WHERE VIEWS DIFFER

The team splits on sequencing. Some want the CRM-ERP link launched now, while one answer says to clean up duplicate customer records first. On quotes, some want new estimating software now, while one answer says to sort simple from complex requests first and add the tool later. Several answers also ask for monthly field tech recognition, such as leadership ride-alongs, compliments relayed through the work-order app, or an award with a real reward, but they do not agree on the format.

💬 Who will own the CRM-ERP integration, and do we clean up the customer list before connecting the systems or alongside it?

EVERY RESPONSE, IN RANDOM ORDER (33)

1. Monthly cycle count of every truck against the truck stock list, run by the warehouse. First time fix is better but I still run out of the common contactors and capacitors by midweek. A count the last Friday of each month would keep the list honest.
2. Replace the quoting spreadsheet with proper estimating software that has a price book updating from the ERP. The senior estimator would own it, with Tom signing off on the rollout. Without it we will keep missing the 48 hour mark no matter how hard people work.
3. We lose a few small accounts every year just because nobody called. Customer Success should phone every agreement customer before renewal and ask if anything went wrong this year. Jordan could split the list among the reps.
4. Connect the CRM and the ERP so a won quote creates the job and the customer record without anyone retyping it. Right now billing re-keys scope and pricing from the sales handoff, and we only catch mistakes when a customer disputes an invoice. I'd put Priya over it with someone from sales on the team, and scope it before December so renewal terms carry over too.
5. I'd start a handoff checklist and a short call for installs over a set dollar size, maybe 10k. I know sales will push back on one more meeting, but I would rather spend 20 minutes than take the angry call from the customer later.
6. Pair each apprentice with a senior tech and put a 30 minute Friday check in on the calendar for the first 90 days. Ray and the other seniors are stretched thin, and we don't want the apprentices picking up shortcuts just because everyone is rushing. Kevin is doing great but he shouldn't be left to figure it out alone.
7. Pilot a CRM to ERP integration on install jobs for the first 90 days. Sales owns the CRM side, finance owns the ERP side, and one person from each meets every other week until it works. Then expand to service work once we trust the numbers.
8. Start a monthly field tech recognition award voted on by dispatch and customer comments, with something real attached like a gift card or an extra half day off. The shout-outs at town hall are nice but they mostly go to office people. Techs worked brutal overtime in July and it barely got noticed.
9. I'd go with 48 hours for standard quotes but not for complex installs, those need a site walk. Start with a morning triage where Tom sorts incoming requests into simple and complex, and only hold the simple ones to 48 hours. The tool can wait until the process actually works.
10. weekly 15 min install review on Thursdays, the sales rep walks the upcoming installs w/ the crew leads. catches the stuff that wasn't in the quote before we're standing on the roof
11. link the crm and erp. one entry, quote to invoice. stop the double typing

12. Marcus and Erin should ride along with a different crew every month and post what they saw in the company chat. Not a formal program, but the field needs to see leadership actually noticing the work. I'd start in October and keep it going through the heating season.
13. Renewal campaign with a price review built in. Finance gives Customer Success a margin report on each agreement by mid October so we don't renew the unprofitable ones at the old rate. Weekly 20 minute sync between the two groups until December.
14. monthly tech of the month, picked by crew leads. Erin owns it
15. Fine to connect the CRM and ERP, but clean up the customer list first, we have duplicates everywhere. Otherwise we just sync a mess faster. Whoever handles the ERP admin work should run a 30 day cleanup before any hookup happens.
16. quotes sit for a week and customers go w/ whoever answers first. need a 48 hr rule and a tool that isnt a spreadsheet somebody built years ago
17. Let dispatch pass along customer compliments straight to the tech through the mobile work-order app whenever a customer calls in praise. It takes two minutes and dispatch usually hears it first. Dana could own it and report the count at the town hall.
18. Cleanup week for the shared drive with a fixed folder structure, one owner per department and a simple naming rule. Nobody can find anything right now. Archive the old stuff and lock the top level folders so it stays clean.
19. Add a field tech spotlight to every town hall where Customer Success reads actual customer comments from post-job follow ups. Techs almost never hear that stuff, and it's good stuff. Keisha's team already collects it, so it's just a matter of putting it on the agenda.
20. 48 hour quote turnaround, tracked on a board everyone can see
21. When I renew an agreement I update the CRM and then email billing so they change the ERP. I would like those two to talk so a renewal or price change just shows up on the invoice without my email.
22. install kickoff meeting. sales hands off to the crew lead before the PO goes to purchasing
23. A 30 minute kickoff for every install before the crew gets the job, with the account exec, estimator, crew lead and warehouse in the room, scheduled within two business days of the PO. Last month we showed up to a rooftop unit swap and the crane access was not in the notes. That kind of thing gets caught in 30 minutes.
24. Set a 48 hour target for quotes under a certain size and give the estimators a real estimating tool instead of the spreadsheet. Hannah and the other estimator rebuild from scratch each time and formulas break. Saved assemblies and labor rates would cut hours per quote. Track turnaround weekly and show it at the Monday all-hands.
25. Cut the company chat channels down to maybe eight and pin a list of what each one is for. Dispatch posts get buried under everything else. Whoever admins the chat could do it in an afternoon.
26. Add a quote request form in the CRM that routes straight to an estimator with a due date 48 hours out. Customers ask me about their quotes constantly and I have no idea where anything stands. At least I could see who has it and when it's due.
27. Require a sales-to-operations kickoff for every install, run through Luis's service operations side with the account exec presenting scope. Hold it the same week the PO comes in. The output should be a one page form on the shared drive that the crew lead signs off before mobilizing.
28. Build a renewal campaign for the December maintenance agreements, led by Customer Success. Start in early October with the top 20 accounts through the QBRs, then work the rest by phone. Each account manager gets a list and a weekly status check so nothing slips to the last two weeks of the year.

29. Renewal tracker, reviewed weekly. Keisha's team owns it. Start now, not November.
30. I spend a big chunk of every Tuesday matching job numbers between the CRM and the ERP just to bill correctly. A real connection where the job number follows the work from quote to invoice would save me and Carmen hours. Start with install jobs only.
31. I'd like sales and Customer Success to split the renewals list so account execs take the ones with upsell potential. But Customer Success should run the calendar and the pricing letters, sent 90, 60 and 30 days out. One owner for the calendar or it falls apart.
32. Launch the CRM to ERP integration as a funded 90 day project with a single accountable owner, preferably the CFO, and a go-live for new quotes by the end of Q4. Today a job lives in three places before it is invoiced, and we cannot see margin until well after the fact.
33. Kickoff meeting for installs so the warehouse knows what to order before the crew is on site. Mike or someone from the warehouse needs an invite. We keep finding out about long lead items halfway through the job and then the crew sits.

YOUR NOTES ON START

3 PRE-PLANNING STOP

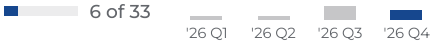
What is one recurring habit, process, or task that slows you down, wastes time, or drains energy without adding real value?

KEY TAKEAWAY

Stop planning schedules around overtime as the default, since it drains the same people every week and answers link it to losing senior techs.

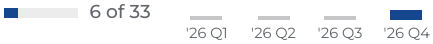
The team's biggest drains are planning around overtime, an overgrown company chat, a shared drive where nobody can find the current file, and typing the same work-order and customer data into the ERP twice. Smaller groups also want schedule changes moved off text messages onto the dispatch board, and one sign-off on small purchase orders.

Overtime as the default plan



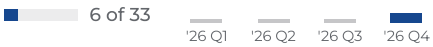
Tight schedules assume the same people will stay late, often with no notice and approval after the fact. This is a planning habit, not a tool problem; answers ask for caps, rotation, earlier decisions on what slips, or more hiring.

Too many company chat channels NEW



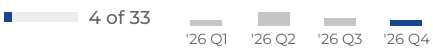
Channels per branch, department and job, many for finished work, bury the messages that matter and pull work-order questions out of the app and ERP. Most see a usage problem: archive dead channels, merge the rest and define what belongs in chat.

Shared drive has no owner RISING



Contracts, quote templates, spec sheets and manuals sit in similar undated folders or multiple 'final' copies, so people dig or ask for emailed copies. Answers blame ownership and habits more than the drive itself: one naming rule, one location, one owner.

Re-keying data into the ERP



Hours and parts from the mobile work-order app, and customer details from the CRM, are typed into the ERP by hand, which causes mismatches and billing callbacks. This is a tool gap: connect the systems, even with a nightly export.

Raised before, not now: Schedule changes by text (6 of 31 in 2026 Q3); Quote requests missing site information (5 of 31 in 2026 Q3); Mid-quarter additions, nothing dropped (4 of 31 in 2026 Q3).

WHERE VIEWS DIFFER

Not everyone wants the same fix: one answer likes per-account chat channels and wants quiet hours instead of fewer channels, and another says the drive is fine and the real issue is files saved to desktops. On overtime, one answer values the extra pay and only wants a day's warning, and one answer would keep two signatures on purchase orders above a modest threshold.

What would we decide earlier each week, cap or turn down, so overtime becomes the exception instead of the plan?

EVERY RESPONSE, IN RANDOM ORDER (33)

1. Too many chat channels. Merge them down to a handful.
2. the company chat. every branch has its own channel, then every department, then every big job, and people post the same thing in three places. i spend the first twenty minutes of the morning scrolling to figure out what matters. pick one channel per branch and one for urgent and archive the rest
3. Honestly I don't mind overtime in peak season, the extra pay matters to me. What bugs me is when it's mandatory with no notice on a Friday afternoon. Keep it, but give us a day's warning.
4. files named final, final2, final_use this one. stop saving copies of everything and keep one version of each. also a search that works would be nice
5. Copying customer info from the CRM into the ERP when a deal closes. Same address, same contacts, typed twice, and we still get mismatches that cause billing problems later. Whatever connects the two systems should be prioritized.
6. Two signatures on a purchase order for a $150 part. By the time both people approve, the truck has already rolled without it. Set a limit, say under $500, and make it one approval.
7. I know people gripe about the shared drive but my folders are fine. The real problem is files saved to desktops. Require anything customer related to go on the drive first, then worry about reorganizing.
8. Chat pings all day, half of them not for me.
9. Customer reps re-explain agreement terms to callers because the account notes are inconsistent. Everyone writes them differently. Standardize how notes are entered.
10. At the end of a job I note parts in the app, and a few days later billing calls me to confirm them because the ERP shows something different. If the numbers moved over automatically we'd skip all of that. Even a nightly export would beat hand typing.
11. Weekly leadership meeting runs long because we read status updates out loud that we could have read beforehand. Send a one page update the day before and use the hour for decisions.
12. I understand why we have two sign-offs on purchase orders, but I'd keep them above a modest threshold, not drop them entirely. Last year a duplicate order got caught by a second set of eyes. Below a few hundred dollars, one is plenty.
13. Quotes sit in the queue while an estimator rebuilds the same line items in the quoting spreadsheet. I wait days and the customer goes cold. Build standard packages for common jobs so small quotes don't need a full estimate every time.
14. Warehouse paperwork, vendor price sheets and equipment manuals are scattered across the shared drive with no logic. A tech asks me for a manual and I dig for ten minutes. Somebody should own the structure and clear out the old stuff.

15. I get pinged from something like fourteen channels and half are for jobs that wrapped up months ago. I mute most of them, then miss the one message actually meant for me. Archive the dead ones.
16. Overtime has turned into how we plan. If a schedule is tight we just assume people will stay late. July was a record month and I'm proud of it, but I'm tired. We need to hire or push back on non-urgent jobs instead of burning the same people again.
17. Overtime for the same few people every week. Rotate it, or bring in the new hires sooner, so it isn't always Ray and the other veterans carrying the load.
18. Payroll runs heavy every period now because of overtime, and a lot of it gets approved after the fact. I'd like approvals before the shift, not when I'm reviewing timesheets. It would help me forecast too.
19. Schedule changes coming through text at 6 in the morning. I find out my day changed when I'm already driving. Put changes on the dispatch board and keep texts for real emergencies.
20. Retyping app work orders into the ERP. Hook them together.
21. Chasing techs for missing signatures on completed work orders so I can invoice within 48 hours. It happens several times a week. Make the signature required in the app before the job can be closed.
22. Looking for the current version of a quote template or a spec sheet on the shared drive. There are three folders with similar names and none of them is dated, so I end up asking someone to email it to me.
23. The handoff from sales to the install crew. We get a job with a scope sheet missing equipment details or site access info and have to call sales to piece it together. A required checklist before a job is released would fix most of it.
24. We leaned on overtime all summer because it was easier than telling customers no. It worked once, but I can see the cost in retention, especially after losing two senior techs in May. We should set a cap per tech and decide earlier what slips to next week.
25. Notification volume from the company chat is the largest interruption in my day. Questions that belong in a work order note end up in a channel, and I answer them twice. We should define what goes in chat and what goes in the ERP or the app.
26. Everybody complains about the chat channels, but I actually like having one per big account. What drains me is the notifications at night, not the channel count. Set quiet hours and leave the channels alone.
27. Stop scheduling around overtime as the default.
28. Last week I spent close to an hour looking for a signed maintenance agreement for a clinic so I could confirm the filter schedule. It was in a folder named with a salesperson's initials. I finally called Jordan, who had a copy in email. Pick one naming rule and one place for signed contracts, and make everybody stick to it.
29. Texts changing the schedule. Use the board.
30. can't find anything on the shared drive. needs a clean folder structure and someone who owns it
31. Install crews get a text that a start date moved, then another saying it's back, and meanwhile the customer was told something different. By the time we sort it out we've lost half a morning. One person should send changes, in one place, and sales should confirm with ops before telling the customer anything.
32. Dual approval on small POs. One sign-off under a threshold.
33. Techs fill out the mobile work-order app and then billing re-keys the hours and parts into the ERP. Same info twice. Sofia and I catch typos all week that wouldn't exist if it just flowed over.

YOUR NOTES ON STOP

4 PRE-PLANNING CULTURE

Reflecting on the past 90 days, how would you describe our workplace culture, and what is one concrete recommendation to improve or strengthen it?

> KEY TAKEAWAY
> **Schedule a real recovery stretch in early Q4, with fewer meetings, paused nonessential projects and time off people actually take, before adding new initiatives.**

Most of the team says the summer peak pulled people together, with crews, dispatch, warehouse and office covering for each other, and several are proud of the results. Many also say people are worn out, and the field and warehouse feel under-recognized and left out of decisions.

Peak season built real teamwork RISING



Many describe July and the rooftop blitz as a time when teams covered for each other without pointing fingers. They credit the 7:15 huddle, truck stock and cross-team help, and say customers noticed.

People are worn out FALLING



Several say the team is running on fumes after overtime, six-day weeks, upset customer calls and payroll corrections, and some areas are now behind on regular work. They ask for recovery: fewer meetings, paused nonessential projects, real time off, caps on consecutive six-day weeks and shared on-call.

Recognition favors the office



Town hall shout-outs are welcome, but people say they mostly go to office staff and are often a single sentence, while field crews and the warehouse stay invisible. Suggestions include reading customer compliments in full with crew names, posting them in the company chat the same day, letting the field nominate people, and leadership riding along with crews.

Field hears about changes last



Some say schedule and tool decisions get made without the field, changes land on the dispatch board unannounced, and install handoffs break when scope changes or permits are missing. Sales-to-estimator quotes are a sore spot too.

Raised before, not now: Senior tech departures and mentoring (7 of 31 in 2026 Q3); 48-hour invoicing push results (3 of 31 in 2026 Q3); QBRs lifting customer relationships (3 of 31 in 2026 Q3).

WHERE VIEWS DIFFER

One answer says the culture did not really change and wants fewer cheerleading announcements and more concrete fixes. Views on the CRM and ERP connection also split: one answer wants it delayed until January, another wants a named owner and a date now.

💬 Which projects and meetings will we pause through October and November, and how will we make sure people actually take the recovery time?

EVERY RESPONSE, IN RANDOM ORDER (33)

1. New hires bring energy. Set up a mentor stipend for the seniors.
2. I started in January, and honestly the newer folks are the ones who ask why we do something a certain way. The seniors seem to enjoy teaching the apprentices too. Try a monthly lunch where new and experienced techs each share one trick.
3. we pulled it off. long days but crews had each other's backs and that's what I'll remember. next year order the big equipment earlier so installs aren't sitting waiting on a delivery in the middle of peak
4. Too many channels in the company chat and nobody can find anything on the shared drive. People are annoyed but don't say it out loud. Cut the channels down to a handful and name one person to clean up the shared drive folders.
5. Everybody is wiped out. Give people a real long weekend in October.
6. tired. comp time that actually gets used would help
7. proud of how the crews handled july. everybody picked up extra calls w/o being asked. would like a peak season bonus plan written down before next june so it's not a surprise
8. Shout-outs at the town hall are nice, but they mostly go to people who work in the building. Techs on the road hear about them second hand. Someone from leadership should ride along with a crew for a day each quarter.
9. Customers noticed. Several told me the techs showed up when they said they would and that hasn't always been true. Account managers should post those compliments in the company chat the same day.
10. July showed what we can do. Keep the Friday crew lunch going through next peak.
11. Culture is fine inside teams but between sales and the estimators it's tense. Quotes take too long and customers go elsewhere. Set a two day target for standard quotes and post the numbers where everybody can see them.
12. The handoff on installs still breaks. Crews show up and find the scope changed or the permit isn't pulled. A one page handoff checklist signed by sales and the crew lead before anything gets scheduled would save a lot of frustration.
13. The past 90 days reflected a strong commitment to Own It and Win Together. Cross-branch support was visible, with North technicians covering Lakeside calls during the July surge. I recommend formalizing a cross-branch coverage rotation so that this support is planned rather than improvised.
14. Strong teamwork this summer. Start rooftop blitz planning earlier next year.
15. We hit a record month and nobody pointed fingers while doing it. Dispatch, warehouse and techs covered for each other all summer, and I think the 7:15 huddle is a big part of why. My recommendation is to keep the huddle exactly as it is and add a five minute slot on Fridays for what went wrong that week, so we fix it before it repeats.

16. I've been in this trade a long time and the field has always felt like the last to know. The shout-outs are good. What would help more is hearing about changes before they land on the dispatch board, even a short note in the company chat the afternoon before.
17. Kevin and the other apprentices are eager, which is great. The problem is that mentors are usually too busy to teach properly. Give mentors protected time on the schedule, maybe two hours a week, rather than hoping it fits in.
18. The apprenticeship launching in August and the two senior hires gave us a lift after losing two people in May. The culture feels more hopeful now. I'd recommend we publish apprentice milestones so everyone can see the path and cheer people on.
19. warehouse and fleet are kind of invisible, we keep trucks stocked and nobody says anything until something is missing. town hall shout outs started which is a start. let the field nominate people, not just managers
20. I do see improvement. The town hall now names technicians, which didn't happen a year ago. But decisions about schedules and tools still get made without asking us. Put two techs on the quarterly planning day agenda and let them speak.
21. Having the apprentices around has lifted the mood. They ask questions and it makes the rest of us explain things properly. Pair each one with a single senior tech for a full quarter instead of rotating them.
22. Billing and collections kept pace even with the volume. Sofia stayed late more than once to get invoices out inside 48 hours and nobody made a big thing of it. Please tell finance when a big install or rooftop push is coming so we can plan around it.
23. Honestly the summer felt like one team for once. Estimators turned around rush quotes for the rooftop blitz and ops actually said thank you. I'd like to keep that going by having someone from sales sit in on the dispatch huddle once a month, so we understand what the field is dealing with day to day.
24. Install crews work on roofs and in mud and then hear nothing about it. A shout-out is great but it's usually one sentence. I'd like customer compliments read in full at the town hall, with the crew's name on them.
25. The team is running on fumes. Customer service reps took a lot of upset calls during the heat, and the cold snap in January had already left us thin. People are a little shorter with each other in the chat than they used to be. I'd like leadership to schedule a recovery stretch with fewer meetings and no new initiatives for two weeks.
26. Dispatch handled huge volume and it shows. The huddle helps but the days are still long. Add a second person to the evening on-call rotation so one person isn't carrying it every week.
27. July was brutal on the overtime. I'm proud of it but my body is telling me something different. Please cap consecutive six day weeks next summer and actually stick to the cap.
28. Honestly I don't think the culture changed much. We got busy, and people say we pulled together, but mostly everyone just did their own job. I'd like fewer cheerleading announcements and more concrete fixes, like the CRM and ERP connection getting a real owner and a date.
29. We asked a lot of people this summer and I think we owe them something back. The culture is still good but it feels thinner than it did in the spring. I'd keep the Q4 planning day lighter and hold off starting the CRM and ERP connection work until January.
30. Payroll with that much overtime meant a lot of corrections and a lot of extra checking. Finance is behind on regular work now and we're just catching up. I'd pause any nonessential projects until November so we can get current.
31. Shout-outs help. Still feels like the office gets the credit.
32. Truck stock made a real difference, way fewer trips back to the shop in July. The warehouse crew deserves the credit for that. Add a second restock run on Mondays during peak.

33. Good results, but I'm burned out from chasing renewals while also answering quote questions all day. A quiet start to Q4 would be welcome. Block no-meeting Fridays through October.

YOUR NOTES ON CULTURE

5 PRE-PLANNING COMMUNICATION

Where did a communication breakdown occur in the past 90 days, and what exact process or channel change should we implement to prevent it?

KEY TAKEAWAY

Require a standard install scope sheet, covering scope, site contact, access, equipment, timeline and payment terms, that ops signs off on before any install is scheduled.

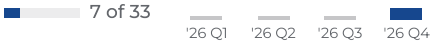
Most answers point to the sales-to-operations handoff on installs as the repeat breakdown: scope, site conditions, timelines and payment terms do not travel with the job. Pricing changes that reach customers before account managers or billing, schedule changes that reach techs late, and chat channel sprawl follow close behind.

Install handoff loses scope



The team calls this a pattern, not a one-off: jobs reach ops, the crew, the warehouse and billing without full scope, site access, materials, timeline or payment terms, which leads to change orders and idle crews. Fixes include a required scope sheet signed by ops, a kickoff meeting or walk-through for larger jobs, and required fields in the CRM or work-order app.

Price changes not briefed internally NEW



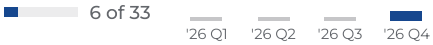
Renewal and maintenance agreement rates changed before account managers, customer success or billing knew, so invoices went out wrong and customers called with questions nobody could answer. With December renewals coming, several ask for a rate sheet, talking points and a pre-brief before letters go out.

Schedule changes reach people late



Dispatch changes, customer reschedules, overtime and crew start dates reach techs or customers hours late or the same morning. Proposals include push alerts from the work-order app, a way for CS to update the dispatch board, and one named owner for same-day customer calls.

Too many chat channels NEW



People mute or skim channels, so parts requests, quote status questions and an urgent no-heat call got missed or sat. Answers call for consolidating channels, but they propose different structures.

Raised before, not now: Staff departures handled by rumor (5 of 31 in 2026 Q3); Parts delays not reaching customers (5 of 31 in 2026 Q3); Incomplete job close-out data (3 of 31 in 2026 Q3).

WHERE VIEWS DIFFER

A few answers saw no major breakdown this quarter, and one credits the 7:15 huddle with fixing most issues. The team also splits on remedies: some want meetings for install handoffs while others want required form fields, and channel fixes range from merging to a handful to one urgent field channel or an announcements-only channel.

💬 Who owns the install scope sheet, where does it live (CRM, work-order app or job folder), and which jobs also need a live kickoff with the crew lead?

EVERY RESPONSE, IN RANDOM ORDER (33)

1. Install scope was wrong on the school job. Send us the real scope before day one.
2. Billing gets installs with no clear deposit or milestone terms, so we invoice late or get it wrong and have to credit it back. Put payment terms on the handoff form.
3. With the December renewals coming, we have not explained the pricing logic to the account managers, so each one is improvising with customers. We need a renewal playbook and a working session this fall with finance, sales and customer success before any renewal notice leaves the building.
4. customers keep calling about a higher bill on their PM agreement and we didn't know it changed. a heads up email or a short FAQ before the invoices hit would help a lot
5. An early renewal for a property management account included a discount that ops and customer success didn't know about, and then a tech quoted extra work at full price on site. Post renewal terms in the CRM account notes and add a line to the weekly leadership meeting notes when terms are unusual.
6. Customer info lives in both the CRM and the ERP and they don't match. A billing contact was wrong on an invoice and it went to someone who left the building two years ago. Whoever leads the connection project should clean up contacts first.
7. Couldn't find the current pricing sheet on the shared drive, found three versions with different dates. Pick one folder, name files by date, archive the old ones.
8. A few maintenance agreements got a price change in the ERP but billing wasn't told, so invoices went out at the old rate on a couple of accounts. We'd like a rate change notice form that goes to billing whenever rates are updated, not just a chat message that scrolls away.
9. Too many channels in the company chat. I missed a parts request because it was posted in one I'd muted. Cut it down to a handful and archive the rest.
10. The new apprentices weren't told which truck they were riding on for the first week, so a couple of them stood around the shop Monday morning. Send a welcome schedule the Friday before anyone starts.
11. The proliferation of chat channels has diluted important announcements. Proposed change: create an announcements-only channel limited to leadership posts, and consolidate operational channels by branch and function.
12. Overtime in July got posted late, sometimes the same afternoon, and a lot of us felt like nobody noticed the hours. A heads up on expected OT a week out from the service manager, and a plain thank you after a stretch like that, would go a long way.
13. Customer reschedules by phone with a CS rep and dispatch finds out hours later. Give CS a way to update the dispatch board directly, or a quick form that pings whoever runs the huddle.

14. Crew start dates shifted twice on a school job over summer break because of a delivery delay, and the school didn't hear about it until the morning of. Any schedule change on an install should go to the account contact the same day, with one named person responsible for making that call.
15. A customer was told one install timeline by sales and a different one by ops, and I heard about it from the customer. Account managers should be copied on the handoff and get the install schedule in writing.
16. The sales to operations handoff on installs is still our weak spot. Three jobs this quarter went out with scope gaps that showed up as change orders on site. I would require a kickoff meeting within three days of award, with sales, the estimator, the crew lead and dispatch, plus a one page scope saved in the job folder on the shared drive. Not optional for jobs over a certain size.
17. We showed up to a clinic install and the quote said two rooftop units, but the curb adapters weren't in it and nobody had checked roof access. The crew sat for half a day while we got a lift arranged. Right now the handoff from sales is a forwarded email and the quote PDF. I'd want a 15 minute walk-through between the account exec and the crew lead before any install over a set dollar amount gets scheduled, with site photos attached to the work order.
18. Honestly can't think of a big one this quarter. The 7:15 huddle fixed most of what I would have said.
19. channel sprawl. things get buried. merge to like five
20. Install scope on the rooftop unit swap didn't match what was sold. Need a signed scope checklist before the job goes to ops.
21. I'm in over 30 channels and honestly I skim them. A quote status question sat unanswered for two days. We need a naming rule and a quarterly cleanup, delete anything quiet for 60 days.
22. Material lists for installs reach the warehouse late or with the wrong sizes. Send the final scope the same day the job is won so we can order before the crew is booked.
23. install handoffs, again. what sales promised on the restaurant makeup air job wasn't what the quote said. add a required scope sheet in the CRM that ops signs off on before the PO goes out
24. Same day schedule changes not reaching techs in time. Need a text alert from the app.
25. Renewal pricing changed and AMs weren't told why. Need a pre-brief before notices go out.
26. Quote turnaround is slow and nobody tells sales where a quote sits in the queue. Add a status column to the quoting spreadsheet and post a three day target so we can at least tell customers something.
27. Payables questions end up scattered across general, finance and a couple of project channels, and I've had to ask the same thing twice. One finance requests channel with a simple template post would fix it.
28. Installs show up on the dispatch board with just a job name and a date. No scope, no site contact, nothing on access. Make site contact, access notes and equipment list required fields in the mobile work-order app before dispatch will schedule it.
29. Nothing major broke on my side. The risk I see is that questions from the field at the monthly town hall get answered live and then never written down. We should post the answers in the chat within two days of each town hall.
30. Dispatch posts changes in one channel, the branch has its own, and then every big job gets a channel too. Techs end up checking four places. A no-heat call got answered in the wrong channel last month and sat for 40 minutes. Pick one channel for urgent field requests, pin the rules at the top, and make everything else a thread under it.
31. Price increase letters for renewals went to customers before the account managers saw the new rates. I got a call from a school contact asking why and had nothing to tell him. Give us the rate sheet and a one page talking points sheet a week before letters go out.

32. Estimators build the quote in the quoting spreadsheet, but site conditions found during the account executive's walkthrough often stay in their personal notes. A mandatory site-conditions section, completed before the quote is finalized, would carry that information into the handoff to operations.
33. Got moved to a different job after I'd already loaded the truck for another one. Heard it from another tech first. Dispatch changes should push to the work order app as a notification, not just show on the board.

YOUR NOTES ON COMMUNICATION

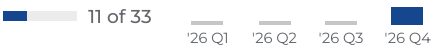
6 PRE-PLANNING FOCUS

If the company could accomplish only ONE single priority in the next 90 days to guarantee success, what should it be?

> **KEY TAKEAWAY**
> **The team does not agree on one priority, though December renewals draw the largest group and depend on enough rested technicians and clean billing to succeed.**

The team is scattered across four priorities, with no single priority backed by most answers. December maintenance agreement renewals draw the largest group, followed closely by keeping and growing the technician team before winter, fixing the sales-to-install handoff, and connecting the CRM and ERP.

Lock in December agreement renewals RISING



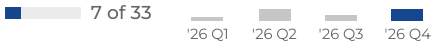
Renew the preventive maintenance agreements early, starting in October with settled pricing, before heating calls take over. Several single out the largest account and want clean invoices before renewal letters go out.

Keep and staff technicians before winter



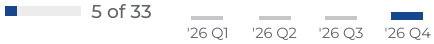
Senior technicians are worn out after July, and losing one more to a competitor would hurt in January. Answers call for a pay review, a retention plan, more hires, apprentice mentoring and less overtime.

Fix the sales-to-install handoff



Crews arrive with missing site details, wrong equipment and dates nobody checked, which causes return trips and upset customers. Proposed fixes include a signed handoff sheet, a short pre-PO handoff meeting and one owner between sales and dispatch.

Connect the CRM and ERP NEW



Data is keyed twice and does not match, billing learns of sold jobs late and misses the 48-hour invoice target, and monthly numbers are built by hand. Some see this as support for renewals and handoffs too.

Raised before, not now: Reliable service through summer peak (8 of 31 in 2026 Q3); Parts stock and second sources (4 of 31 in 2026 Q3).

WHERE VIEWS DIFFER

The team splits between protecting revenue through renewals and protecting the field team, and one answer would rather protect crews than chase another record month. A few answers fall outside all four themes, naming quote turnaround and the shared drive and chat channels.

If renewals are the priority, what do we commit this quarter to keep senior technicians from leaving before the winter work those agreements promise?

EVERY RESPONSE, IN RANDOM ORDER (33)

1. Get the CRM and ERP talking. Billing finds out about a sold job days late, and then we miss the 48 hour invoice target.
2. A real handoff meeting for every install before the PO is released. Sales, the estimator and the crew lead in a room for 20 minutes. We keep ordering the wrong material because the notes in the CRM are thin.
3. Our crews keep getting jobs with missing site details, the wrong equipment on the order, and a customer who was promised a date nobody checked. Pick one fix: a one page handoff sheet that sales has to complete and the crew lead signs off on. It would save rework and some very awkward customer calls.
4. Staff up for winter. Dispatch can only do so much if there aren't enough trucks with techs in them.
5. Renewals. Keep every agreement we have.
6. Keep the techs we have and finish hiring before the first cold snap. Last January was brutal with the staff we had.
7. The priority should be securing renewal of the preventive maintenance agreements that expire in December. These contracts provide predictable revenue and give the technicians planned work through the slower months. Customers are most receptive when the service history is fresh, so we should present each renewal with a summary of what was done on their buildings this year.
8. Finish the CRM to ERP connection, or at least scope it properly and pick a start date. Right now I can't tell from the pipeline what has actually been invoiced, and finance can't see what is coming. Leadership asks for numbers and we build them by hand in a spreadsheet each month. Fixing that would help renewals, handoffs and quoting too.
9. CRM and ERP integration
10. Renew the maintenance agreements in December. Everything else follows from that.
11. Keep the maintenance agreement base intact through December. It is the steady revenue that keeps the crews busy when emergency calls slow down.
12. Renewals, and make sure the invoices on those accounts are clean first. I have seen customers hold off signing over a billing dispute from the summer. Sofia and I could clear those up before the renewal letters go out.
13. I'd say renewals. Most of our maintenance agreements come up in December and the QBRs have been going well, so we have momentum. Every account manager should have a renewal plan for their accounts by mid October, with pricing already settled. If we wait until the holidays we will be chasing signatures while everyone is on call for cold weather.
14. Get the top 20 accounts signed early for next year. Several already renewed or expanded, so use that as the push for the rest.
15. Fix the handoff from sales to install. Crews show up and find the scope isn't what the customer thinks they bought.

16. Do something so the field feels seen. The shout-outs are nice, but the techs I talk to still think the office doesn't get what the summer was like for them.
17. stop the install handoff from breaking. every time it costs us a return trip and an annoyed customer
18. Clean up the shared drive and cut the number of chat channels. I lose part of every day looking for a file.
19. get the PM agreements renewed before year end. start the calls in October, not December
20. Cut quote turnaround time. Sales waits a week or more on bigger quotes and customers go elsewhere.
21. Make sure nobody else leaves for a competitor. Review technician pay against the market now, before another resignation forces it.
22. Cut the overtime. We got through July, but people are worn out, and I would rather protect the crews than chase another record month.
23. Lock in the December renewals, starting with the hospital system. Eleven buildings is a big piece of our revenue, and losing even a few would hurt more than any slow quote.
24. I think the handoff between the signed quote and the schedule needs one owner. Right now it falls between sales and dispatch, and nobody feels responsible when a job starts late.
25. Get the apprentices up to speed and hire at least two more experienced techs. Winter will expose any gap in the field.
26. get renewals done early, before the heating calls take over everyone's week. honestly if we lose two or three big ones nothing else we do this quarter matters
27. Sales to ops handoff on installs.
28. one source of customer records. connect the CRM and ERP so account managers can see open invoices before they call a customer about renewal
29. retention of senior techs. we lost two in May and one went to a competitor for more money. look at pay before winter, not after
30. Technician headcount. The two new senior hires help, but Ray and a few others carry a lot of the knowledge, and I worry they are worn out after July. If one more leaves we are in real trouble in January. I'd want a retention plan, maybe a winter season bonus, plus real mentoring time for the apprentices.
31. Get sales and operations aligned on what we promise customers on install work. Lead times, permit time, all of it. We lose goodwill when we promise two weeks and the equipment takes six.
32. Connect the CRM and the ERP. We key the same customer and job info twice and it never matches.
33. Renew the agreements. The hospital system one especially, since it is our largest and we showed them what we can do this summer.

YOUR NOTES ON FOCUS

7 RECOGNITION ALL-STARS

The team is recognizing people who kept a heavy July running, through dispatch, first-visit fixes and calm customer calls, and those passing know-how to the new apprentices after what was lost in May.

RECOGNIZED	CORE VALUES CITED	ANSWERS
Dana Kowalski Re-sorted the dispatch board when emergency calls stacked up in July, answered the dispatch line at 6am, and checked parts were on the truck so techs stopped making second trips. · Runs the 15-minute 7:15 huddle, so techs know their day before leaving the yard and reps aren't surprised by schedule changes.	Do It Right, Win Together, Own It	6 of 25
Ray Dominguez Took the apprentices on his calls through August and explained the why behind each step instead of just fixing things. · Patiently taught apprentices to read a rooftop unit before touching it, passing on knowledge lost in May.	Win Together, Do It Right	4 of 25
Andre Willis Reached a failing walk-in cooler within the hour on a Saturday and had it running before the lunch rush. · Ran more calls than anyone in July, mostly fixed on the first visit, with the right part on his truck and clean work-order notes.	Do It Right, Own It, Customers for Life	4 of 25
Tasha Greene Stayed calm with upset callers during the July heat, gave honest arrival times, and called back when times changed. · Caught a duplicate work order before a tech went out twice and called the customer to explain.	Customers for Life, Do It Right	3 of 25
Kevin Moore New apprentice who restocks his truck against the truck stock list without being told and writes down everything he's taught. · Shows up early, asks good questions, and offered to help on an install on his day off from ride-alongs.	Do It Right, Own It	3 of 25
Brianna Cole Walked the clinic install site before the crew rolled and flagged scope gaps from the sales handoff, saving a day of rework. · Kept her crew on schedule through changes and told sales what was off in the quote without blaming anyone.	Win Together, Own It	2 of 25

Teams recognized: Field team (technicians and install crews) (3).

CORE VALUES CITED

4 Own It **6** Win Together **5** Do It Right **3** Customers for Life **7** No value named

Answers naming each value or its hashtag; one answer can name several.

EVERY RESPONSE, IN RANDOM ORDER (25)

1. Tasha Greene caught a duplicate work order for the school district before a tech got sent out twice, and she called the customer to explain the fix. Saved a truck roll and kept things clear with the customer. #DoItRight
2. Dana Kowalski. The 7:15 huddle changed our mornings and she keeps it to 15 minutes. #WinTogether
3. Tasha Greene took a lot of upset calls in the July heat, when people were hot and our wait times were long. She stayed calm, gave honest arrival times, and called people back when the times changed. A couple of customers who started out angry ended the call thanking her. #CustomersForLife
4. I nominate Dana Kowalski for running the 7:15 dispatch huddle since June. Technicians now know their day before they leave the yard, and the customer service reps no longer get surprised by schedule changes. It is a small meeting with a big effect. #WinTogether
5. Ray D. is teaching the apprentices to read a rooftop unit before they touch it. Patient, never rushes them. #DoItRight
6. Dana Kowalski answered the dispatch line herself at 6am during the worst week of July so the techs could keep rolling.
7. Dana in dispatch. On a Friday in July three rooftop calls came in at once and she reshuffled the board so nobody sat idle. She also checks that the parts are on the truck before sending anyone out, which is why we stopped making second trips. Do It Right.
8. andre w. had the right part on his truck for a clinic's boiler call in july, fixed it in one visit, no return trip. truck stock paying off. #DoItRight
9. Brianna Cole. The handoff from sales on installs keeps breaking, and instead of just complaining she walked the site herself before the crew rolled and flagged what was missing from the scope. It saved a day of rework on the clinic job. #OwnIt
10. Tasha Greene, stayed calm with upset callers all summer.
11. Thank you to the technicians and install crews for July. I see the overtime hours come through every pay period and they were heavy. The work still got done and the customers stayed happy.
12. Andre Willis got a Saturday call from the restaurant group about a walk-in cooler that was failing with a full load of food inside. He rearranged his day, got there within the hour, and had it running before the lunch rush. The manager emailed us afterward just to say thanks. That is the kind of ownership we talk about. #OwnIt
13. Andre Willis. Took on extra calls all July without complaining and still wrote clean notes in the work-order app.
14. Ray Dominguez took each of the three apprentices out on his calls in turns this August and talked through his reasoning instead of just fixing things. Our knowledge isn't walking out the door the way it did in May.
15. Kevin Moore is the apprentice who hustles. He carries tools before anyone asks, writes down everything he's taught, and asked Brianna's crew if he could help on an install on his day off from ride-alongs. You can tell he wants to be good at this. #DoItRight
16. Andre Willis ran more calls than anyone in July and most were fixed on the first visit. #CustomersForLife
17. Kevin Moore, our apprentice. Early every morning in August and always asking good questions. #OwnIt
18. Ray Dominguez. Mentoring the new apprentices on his own time. #WinTogether
19. Dana Kowalski ran dispatch through the worst of July and I don't know how she did it. When emergency calls stacked up she re-sorted the board three times in one afternoon and called customers herself to reset arrival windows. Techs always knew where they were going next and what parts they needed. That is #OwnIt to me.

20. brianna cole kept her crew on schedule on the clinic install even with the changes, and she told sales what was off in the quote without blaming anybody. #WinTogether
21. Ray Dominguez has 25 years in and could easily just do the job faster alone, but all through August he took the apprentices on his calls and explained the why behind each step. Last week he stayed late with Kevin on a chiller so he could see it opened up. He is passing on what we nearly lost in May. #WinTogether
22. all the field guys in July. covered each other's calls and picked up the gaps left after May without anyone being asked twice. #WinTogether
23. The whole field team for July. Record month, long days, and nobody dropped a customer. #CustomersForLife
24. dana k, kept dispatch calm all July
25. kevin moore has been here maybe three weeks and already stays after to restock his truck against the truck stock list without being told. Eager to learn and works hard. Good start for the apprenticeship.

YOUR NOTES ON ALL-STARS

8 EMPLOYEE NET PROMOTER SCORE
ENPS

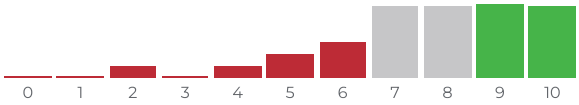
How likely are you to recommend this company as a great place to work to a qualified friend or colleague?

2026 Q4

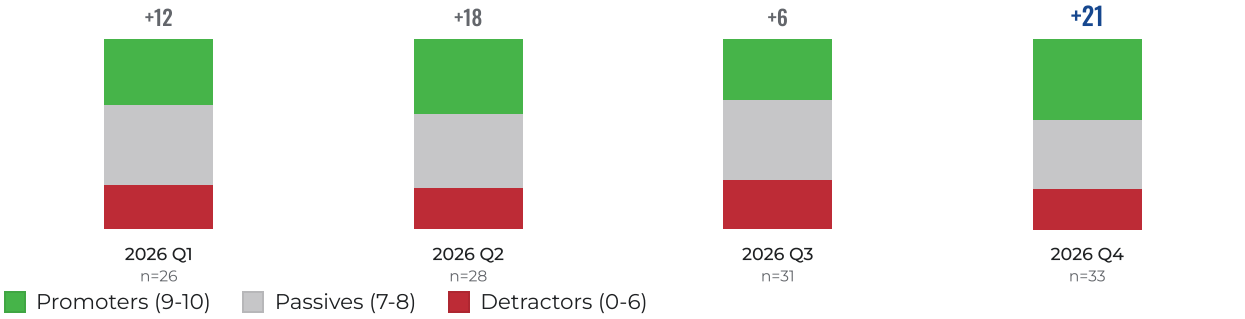
+21

14 promoters, 12 passives, 7 detractors; average 7.8 of 10.

SCORES THIS PERIOD



ENPS BY PERIOD



BY DEPARTMENT, 2026 Q4

Operations	+15	13 ratings
Sales	-50	6 ratings
Customer Success	+60	5 ratings
Leadership Team	+60	5 ratings
Finance	+50	4 ratings

Groups under three are combined so no group's score can be worked out from the others.

KEY TAKEAWAY

Passives mostly ask for working tools, so delivering the CRM and ERP work and cleaning up chat channels and the shared drive is the change most likely to move them.

Most answers praise the people, and promoters add fair pay and visible progress from leadership. Passives and detractors like the team but are held back by summer overtime, clunky systems and a sales-to-ops handoff they call broken.

Good people, fair pay 11 of 27

This is the most common reason across all three bands. Several promoters and passives also call pay and benefits fair, but one detractor says pay hasn't kept up and a senior colleague left for more money.

Summer overtime wore people down 7 of 27

Most detractors and several passives say June through August meant near-weekly overtime and burnout. A few doubt anything changes before next peak. One promoter calls it brutal but says the team handled it together.

Clunky systems, quoting and handoff 7 of 27

Passives name the CRM and ERP, too many chat channels and a messy shared drive as daily time sinks. Detractors say slow quotes lose deals and the sales-to-ops handoff sells install dates ops can't hit.

Leaders listening and investing 7 of 27

Promoters credit the 7:15 huddle, the truck stock program, the apprenticeship, new senior hires and leaders out on rooftops this summer. One passive agrees communication has improved.

> **WHERE VIEWS DIFFER**
>
> Promoters say leadership listens and showed up in the field, while several passives and detractors say the field is still unseen and town hall shout-outs go to the same few people or the office side. Promoters remember the summer with pride, while detractors remember missed family time and burnout.

What will we change in staffing, quoting and the sales-to-ops handoff before next summer's peak so the field doesn't carry it on overtime again?

PROMOTERS' REASONS (9-10), IN RANDOM ORDER (11)

1. Good people, honestly. I'd work with this crew anywhere.
2. Leadership listens more than they did a year ago. Still things to fix but it's moving the right way.
3. The summer was brutal but we handled it together. #WinTogether is actually how it felt on the floor.
4. The 7:15 huddle changed my days. I know what I'm walking into now.
5. Great place if you care about doing the job right. The truck stock program alone saved me a lot of second trips.
6. Erin and Marcus were out on rooftops and in the shops this summer. Didn't just send a message from the office.
7. I've been here a long time and this is the best the company has felt in a while. Customers are renewing early, which says something.
8. Solid team, fair pay, and management that backs you up with customers.
9. 9 because the company is growing and still treats people like people. Not perfect, but I'd tell a friend to apply.
10. Proud of how we got through the summer. Record month and nobody walked away from the team.

11. They started an apprenticeship and hired two senior techs. That tells me the company is investing in people, not just talking about it.

PASSIVES' REASONS (7-8), IN RANDOM ORDER (10)

1. Good benefits and steady work. Too many chat channels, and recognition mostly goes to the office side.
2. Decent place to work. The overtime was a lot, though I get that July was huge.
3. Fair pay, fair workload most of the time. Summer wore everybody down and it showed by August.
4. 8 for the people. Would be higher if the quoting side and the company chat were less of a headache.
5. Pay is fine and the people are good. Systems are still clunky and it costs us time every day.
6. Leadership means well and has improved communication. The field still doesn't always feel heard though.
7. It's a good job, not a great one yet. Hopefully the CRM and ERP thing actually happens.
8. I like my team and my manager. The shared drive is a mess and I waste time hunting for files.
9. 7. Recognition is hit or miss. Shout-outs at town hall are nice but they go to the same few people.
10. Pretty tired after the summer. Good company, just need a breather before I'd push anyone to join.

DETRACTORS' REASONS (0-6), IN RANDOM ORDER (6)

1. The field is still invisible to most of the office. We carry the summer and nobody really sees it.
2. Quotes take forever so I lose deals, then the ones I do close get handed off badly. Frustrating place to sell right now.
3. Worked overtime almost every week from June through August. Thanks in a town hall doesn't make up for missing my family.
4. 6. Good people, but the hours this summer burned me out and I'm not sure anything changes before next peak.
5. Pay hasn't kept up. One of our senior guys left for more money and I get why.
6. Sales keeps selling installs with dates ops can't hit, and then we eat the complaints. Handoff is still broken.

YOUR NOTES ON ENPS

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