

Transcript

Krystal Hobbs 0:04

Welcome to Beyond The Tools, the podcast that helps contractors attract more leads, grow their business, and finally get off the tools. In each episode, you'll discover marketing tactics that work. You'll get actionable insights from other successful contractors, and connect with experts to help you grow. I'm your host, Krystal Hobbs, owner of a social media agency that helps contractors attract and convert more leads. Get ready to take your business to the next level so you can finally enjoy the fruits of your hard labor. Ready, let's go!

Krystal Hobbs 0:47

Hey, contractors, thanks for listening to the Beyond The Tools podcast. I'm Krystal Hobbs and today's interview is really about innovating the way that you train and support your technicians. Our guest today is Trey McWilliams, who is the third-generation owner and CEO of McWilliams & Son Heating, Air Conditioning, and Plumbing. And a fun fact, Trey is actually the brother of Crystal Williams, our guest for episode 24 if you want to check that out. Trey shares how he came up in the trades in his family business and some of the challenges that he saw as they started to grow. If you're at a point in your heating and cooling business, where you are sick of callbacks, and you feel like you are spending time answering the same questions or having to deal with negative customer experiences, this is absolutely something that will help you in your business. Trey shares all of the details behind his TeleTech program, the challenges that they were encountering that inspired that program, and how it's been able to help his team members be empowered to find solutions, have a resource that they can ask any questions to, and also help to build talent as well as promote some of the techs that are already doing an amazing job and want to get to that next level. So let's dive into it.

Krystal Hobbs 2:19

Trey, welcome to the show. Super excited to have you here.

Trey McWilliams 2:23

I'm glad and honored to be on the show today with you Krystal.

Krystal Hobbs 2:26

So, I know you come from a family business of three generations in this industry, can you tell us a little bit about your path through the business and how you came to be the CEO?

Trey McWilliams 2:39

So I was very fortunate. I grew up in the trades business with a grandfather who retired from the Navy and decided to start an air conditioning business. Soon after starting it, my dad graduated from high school and joined the family business. So I grew up seeing my grandfather and my dad run calls and take care of customers my whole life. I began to ride to work on my dad periodically probably starting about the age of eight years old and always had the chance to ride on my grandfather. He was in the Navy and he has done a lot of paperwork. So, he never cared to be in a back office. So, as long as I can always remember my grandfather worked in the field. So that was who I got partnered with every summer until about the age of 16. When my grandfather decided that he had taught me enough and he was retiring, so I soon took over running the service and holding down installs. So, I did that all through high school, graduated high school, and went to work for my dad, and started just really working my way up from everything being a service technician, install team to sales to a service manager, install manager, financial CFO to where I am today. And it's been running McWilliams & Son ever since by myself and the team that I have built.

Krystal Hobbs 4:01

That's incredible. And I imagine in that time, I mean, going from eight years old to 16 to now, I'm sure that changes in the industry have been remarkable.

Trey McWilliams 4:13

The same great people join the trades and get to deal with customers. But the dynamics changed and the speed of change is definitely a lot different than it was when I was growing up in this industry.

Krystal Hobbs 4:26

I can imagine. I know that a lot of contractors have really struggled especially in recent years more so as well in terms of attracting and retaining employees. So, I'm curious what some of the challenges were for you when you were growing up with McWilliams & Son.

Trey McWilliams 4:46

So I think first you kind of step it all the way back to what type of environment I grew up in as far as the personnel and we had very qualified technicians but their home life and who they were as a person didn't always fit the culture that we wanted our business to be. So early on in my career, I learned really quickly that I'm better off training and recruiting people that are great and teaching them the technical side of the business. So very early on, that's always been our approach since probably about 2010. And we've had a lot of success, that just really finding people that want to be in the trades that are great people, gives them the technical skill set that it takes to be successful in the space today.

Krystal Hobbs 5:31

Wow. So I guess what are some of the things that you look for in a potential employee if you're not looking for that technical skill as much?

Trey McWilliams 5:41

So I think the number one thing that you want is you're going to invest in them. The cultural fit of that person. Do they have to have some mechanical aptitude? Yes, but really just the ability to learn that because most kids and both men and women that are joining our team today don't change their brakes on their own car, they don't fix anything at their own house. It's not like we got the older generation where they had all these skill sets and all they had to do was figure out how to apply on HVAC. Seldom they don't have the skill sets at all but they gotta have the ability to learn it. Once we identify the right team members and they're worth investing in, meaning our investments are going to last, then we find the right resources it takes to get those people properly trained.

Krystal Hobbs 6:57

That's really interesting especially because we talk so much about a labor shortage but a lot of contractors are still looking at a pool of potential employees that is so narrow. So, I find it really interesting that you've widened that up by not looking for the same hands-on skills that you would have, 10-20 years ago. Amazing. So, of course, bringing on people that don't have the technical skill, I'm sure has its own challenges. So how do you go through that process of training someone?

Trey McWilliams 7:38

So for us, it kind of evolved. So the first thing you do, for us we're like Hey, I want a different culture. And I was in the mindset of like, I will go help anybody that has a positive attitude. You can wake me up in the middle of the night. I will leave what I'm

doing to go help you. But if you're a great technician far as mechanically but you have a horrible attitude, I just had a hard time, you just wouldn't like it and I didn't want to go out of my way to help you. And I knew if I felt that way, so did all my team members. So, as we begin to change that the biggest thing was paying now we got a bunch of positive people but they need more support. So, that became overwhelming for us and it was twofold. It was we needed to step up our training game or they didn't have to call us as much. But also I needed a support mechanism in place that would support those technicians so they do not feel like they're a burden calling a leadership or another technician. So early on, all that really fell at my existing team members were like, "Hey, we got a new technician, help them out." Everybody was eager to help out but eventually, it just becomes a burden as you add more and more people. So for that, the first thing we really evaluated was how to retrain them, like, what can we do better to make them more competent in the field? And this kind of led us to, we wanted to partner with the rad academy. So we partnered with some different academies to get our technicians up to speed. And then eventually, it made financial sense for us to bring the training portion of it inside. So, that was what we did. The initial thing was I teach these technicians better so they call us less. But the second thing that has probably been the most impactful for our company not just on new recruits but as an overall improvement was we created what we call the TeleTech, which is basically an assigned senior technician that has a ton of resources at his fingertips, that his sole purpose is to support not just our new technicians but that's where the majority of his time is spent, but also any technician that runs across the technical challenge in the field.

Krystal Hobbs 9:47

I am curious, to back it up a little bit there with something that you said. At what point did it make sense for you to bring that in-house? Or perhaps the better question is with TeleTech and having this one person dedicated to being a resource and support, how many people are they typically supporting or training?

Trey McWilliams 10:16

I guess the short answer to the first question was when we started when we were spending about \$70,000 in tuition if you want to call it that, that's when we really started evaluating. Hey, we spent \$70,000. And we can employ someone for a little bit more than that, but have them for the other eight months out of the year to do something additional weather support. So, that for us was more of a play of financial numbers that

made sense for us. So that's when we pulled the trigger and brought a training staff inside.

Krystal Hobbs 10:48

Awesome. And I imagine because you started at a place where you used other academies that gave you something to build on like you weren't starting 100% from scratch.

Trey McWilliams 10:59

Then I think what's probably unique about this industry is people are so willing to share what they do and their successes. So we took things from different academies that we liked, we applied them to our culture, how we do things here, maybe our region, we adapted them to the region that we're in the most what we work on here the most. And I'm really too focused on the basics of these technicians and not try to make them senior technicians in a year but have a plan that just continues to advance them.

Krystal Hobbs 11:31

Okay, amazing. So walk us through TeleTech exactly how it works and how you rolled this out.

Trey McWilliams 11:38

So, kind of go back to TeleTech. Why was it created was pain, pain from a standpoint of always being on the phone supporting a technician in the field. And then being tech minded and having grown up in the industry I also knew how much I hated calling a manager or my dad when I knew he had a million other things going on to help me walk me through a problem. So I was more of a burden. And what we were scared of is, as we track our callbacks and our customer experiences, is, then a technician not calling us what it really cost us in the field of maybe the customer experience, or even a new technician just being frustrated that he felt like we threw them out to the wolves and didn't give him the proper resources and training it took. So TeleTech was really created from that. It's a pain point, not just ours, but a technician's pain point. So for us, we knew from a scalability standpoint, if we are reactive, and that's all we built TeleTech to do was just be reactive to problems, it was going to be very tough to scale it. So we immediately realized that was gonna be a challenge. And we created more of a proactive approach. So for us, if you're going on the call, you're not competent. There's a five-minute pregame video that you're going to watch before you go right and TeleTech's job is working with our dispatch team is to identify an underqualified

technician going on an overqualified call from a technical standpoint. And that technical, you don't mind, let's just use a communicating system that he's not familiar with, maybe we work on carriers all the time. But this is a Linux, we'd have a five to 10-minute pregame video that our team shot already that says, "Hey, here are the 10 things that McWilliams wants you to check when you show up." So that was the proactive approach. We did that through videos. We did it through manuals, like your typical manuals but we might we taken the manuals and really broken them down to what matters from a technical standpoint, so that they aren't looking at a huge manual or any other things, other documents that may be needed in the field. We have those basically built on a website that we built that hosts our videos and our content and TeleTech simply just goes from there and pulls that up, attaches it to ServiceTitan, and has a phone call with that technician when he's headed to the call before he makes the final diagnosis to the customer. And then we did a follow-up call with a technician to make sure we had all the resources he needed and the customer had a great experience and the technician learned. We've learned as we do that, that's actually a better learning tool than putting them back in the classroom.

So now we got a pregame video for that tip to know, "Hey, when you get there, this is a good chance, this is what we did wrong on the install crew." So we pregame videos and all that. A second thing we did was, hey, we knew we were going to work with a technician in the field. So we use software that's on everybody's phone, that we can basically take over your camera in the field. So all our technicians have a magnetic phone case. So, I simply snap it on the side of the condenser with their camera pointing at the control board. We can take it with their camera and we take still shots. We draw on it. From here, we also have a camera or a green screen we can lay our hands in there and work with our meter with you while you're hands-free. We talk to you through airpods that we supply you with so we can have your attention. Secondly, so the customers don't hear us talking to you so it's more of a private conversation. And then we can also overlay any manuals, any documents over the top of what you're looking at on your camera.

So essentially, we give an extension of a technician, as an ear and hand in the field, and give great support from there. And then that kind of leads us to break down every time we have an interaction with a technician or we have a callback, is it a competency problem? Right so that technician just needs more training? If so, what is it? What type of training does he need and particular to that technician? Secondly, we look at whether is it a manufacturer problem. Is there a trend here? So, do we have a manufacturer say

they don't have a problem? But this is an ongoing issue, we're seeing these exact same things on the exact same unit. This cost our company money and we need proof to be able to take that back to the manufacturer and say, "Hey, this is your problem, and there's a cost to fix your problem." Third, is it just a workmanship problem? So do we have an issue with people just not caring, just taking shortcuts not doing in our way. From that, we create basically a call back into support form that says, "Hey, here's the type of callbacks he's having and here's what the solution is. Here's the training solution to that." And then from there, we basically create their training curriculum that helps them instead of technicians coming in and getting a one size fits all training. So TeleTech, again, was created to support the technician, at the same time, give us visibility on what technicians were needing help, what our callbacks were, and really the solutions we were putting in place, or they moved the needle and what we needed to do in our business. So from there, we've cut down drastically on callbacks, and we've also been able to cut down on manufacturing issues where we identify problems much sooner. So where we can create proactive solutions to that instead of people calling us at three o'clock on a Friday afternoon, with a thermostat that we knew as a company that if we were to look deep enough, we knew that serial number at some point was going to give us problems.

Krystal Hobbs 18:34

Right. Wow, that's incredible. So with TeleTech, I know you touched on this, but I'm curious to dig a little bit deeper. How does it work differently for someone who's been with the company for a long time versus someone who's brand new?

Trey McWilliams 18:51

So first off, we're tracking callbacks. So we're watching those typically, your senior technicians a lot of times we'll get little more advanced calls. So more than anything, they use TeleTech as a resource tool, instead of them trying to find the wiring diagram, or they're trying to look up what that supersedes that stock motor. What other solution there could be TeleTech really is the one contact for them to say hey, here's what I got. And we're really clear, like, Teletech's job is, he's not the smartest person on our team but he does manage all our resources. So, there are going to be times when he can patch, maybe he needs to patch me and that phone call or patch a service manager into a phone call with a technician.

His job at the end of the day is to get the customer taken care of in a permanent solution. So whatever resources he needs to tap into, he has full access to everything

we offer as a company. So a lot of our senior tech, that's what they're going to use them for is to really speed up their process of not looking for something and what that does for us, it also allows us to figure out what challenges they're having and we can attach if there's a wiring diagram missing that Miss Jones has had else and we've been having issues there. If we have a technician look it up on his own, it never gets attached to ServiceTitan, if he's had to deal with it and we know it's gone, well now that's a patch to ServiceTitan. And hopefully, we eliminate phone calls in the future which will make us more efficient as a company.

Krystal Hobbs 20:17

So with that, how did that change how you structure your team? Like, how many techs does TeleTech work with?

Trey McWilliams 20:27

One thing we've been working for as we originally thought that a TeleTech could handle 12 technicians. We're currently around 40 techs. So he's managing and still growing. But we've done that because of proactive, the videos, the things that we have that are proactive that hopefully eliminate a very in-depth call. It's very just high level, like, "Hey, the video said check these 10 things. The third one is the problem, I got it fixed, and it's up and going, I checked the other seven things, and nothing going on with that isn't great. That's all we needed." So the more proactive we could be, the less that had to take place, the more empowered, a technician felt, and they have full access to the same access that TeleTech has. So everything is set up on that website to where they can go get all the information they need. We just request that anytime we're sending a technician on a callback or he's got he's not qualified, we monitor that to eliminate callbacks.

Krystal Hobbs 21:59

That's incredible. And so how long has TeleTech been in your business now?

Trey McWilliams 22:05

Two years. And basically, we started with a technician that was fundamentally sound but was also really good at spreadsheets and tracking stuff and I pulled him out of a truck. He was out of a truck for like six months. And his name's Steven Jackson, and then our trainer Andrew Hall, and I just got a room. Here's the problem. And here's what I want the installation to look like, I really don't know how we get there. But here's how I want the installation to look. And those two guys and I kind of just bounce things back and

forth. And finally, put it all together. And we've tweaked it. And volley the last six months. We haven't had to make any adjustments to it. It seems to be doing what we want it to do.

Krystal Hobbs 22:48

Wow. And what effect have you seen that had on your team around the company as a whole?

Trey McWilliams 22:55

So I think accountability. So on the install side, we have TeleTech do another thing. So, we have reactive callbacks and we have proactive callbacks. Proactive callbacks are, anytime a manager is reviewing an invoice, it just doesn't make sense. So we told Miss Jones that we clean the leaves out of our unit or we cut our Rosebud Bush back. And that should keep the pressure switch from tripping. But we all know that's not the solution. So when I read the invoice, if they create, they create a proactive callback. So we have tools in place from an accountability standpoint. So what happened there were callbacks dropped like 85% of callbacks were on both this residential service and install. The second thing was we quit sending our most senior technicians, which also a lot of times some of your better technical technicians could also be better at your better conversion technicians. Well, a lot of times what we were seeing was, a dispatcher is going to say, Who can I get to this call that will solve the problem the first time? I don't want to deal with Miss Jones being upset anymore. So we were sending really sometimes the most qualified conversion tech I had to go fix a technical problem.

So we've seen a big uptick in our conversion rates and that's simply because we don't have to send the most experienced tech on a callback or high technical problem because we have the resources supporting an entry-level technician. And truthfully, they do a better job because they slow down. They check everything. They don't make those assumptions, because "I've worked on a unit like this three times. And this was the fix I had last time. So we're just gonna do it like that and move on." And then we have another call back. To the inexperienced tech with TeleTech support, he checks every little bit of thing now. So, we're running into some issues where hey, they're calling about a problem outside and we fix that but the problem is we never do because we didn't do a full evaluation on the unit. They had stopped at drain a week later, which there was a good chance a good checkout would have solved that problem. And so with our inexperienced technicians supported by TeleTech, they follow all the steps exactly like

we want them to. So therefore we have fewer callbacks. And the experience takes that the best conversion tech is on the right call.

Krystal Hobbs 25:18

That's incredible. So obviously, you've seen a huge difference from the business standpoint as well as a customer-facing standpoint that they are getting the right service, and they're not needing to call back and all of those things, how has that helped you to either attract or retain people in your company?

Trey McWilliams 25:40

So I think from a technician or technician standpoint, I think they fully understand that TeleTech works for them so they're not a burden. So I think that's very important that when I can call someone as a technician and say, This is what I need, and this is the support I need, and I'm not really asking permission to get that support. I'm telling it because they know, that's what he's employed for. So I think that gives a lot of peace of mind to your technicians. Secondly, allowing technicians to get out in real calls so that they can accelerate their technical ability. And it took us longer to really identify who are going to be very technical-minded. We now found that out very early on because we're putting them in, we're throwing them right out there in it, but we have the support team that allows them to be successful in that.

So very quickly, I think the rad tech that has a mechanical ability, he accelerates really quickly in our organization simply because we don't shield him from anything. So being able to recruit guys, though just them knowing and especially Polly, we've focused a lot on the female and female technicians. I think them having that confidence because a lot of times they are weaker in that space, they're great communicators, but they're weaker in that, especially when they got a call, and maybe your service manager's a man, and he's great technical and sucks at communication. So now you have this weird dynamic. So for us, I think they found a lot of confidence available to call into TeleTech. And understanding videos work great because they can learn them at their speed. And they're great readers a lot of the time, so reading it instead of being told in HVAC lingo, they learn that way. So that has worked out well. So overall, I think it just establishes the way we communicate and where your resources are. So as a technician, you know exactly who's supposed to be doing what to support you.

Krystal Hobbs 27:55

It sounds like you've built something that not only helps you to provide a better service but also really empowers your technical team to be solution focused and to teach themselves or to get the support that they need when they need it. That's amazing.

Trey McWilliams 28:17

So far, it's worked out great. A lot of cool reports come out of it for us. And, honestly, just an ongoing product, when we put a new product in a field TeleTech kind of follows up and tracks that product to make sure there are no other issues. So just from an overall like reducing the number of touches we got to have with every call has made a tremendous difference.

Krystal Hobbs 28:39

Amazing. I know, a lot of our listeners are hearing this and saying, "Wow, this sounds amazing, but where do I even begin?" Obviously, this was a big undertaking for your company. So having gone through all of that, what advice would you give to any company that's looking to do something like this?

Trey McWilliams 29:02

So I mean, I think first off is like, making sure you have a need that's big enough to justify the expense it takes to really build something like this out. I think there are some hybrid versions to do in it. But what we did here is we built it out and then we had an organization that practices them that really taught we started working with them on a lot of things and they came in and Terry Nicholson came in and kind of helped us create even better and honestly more in a format that we can implement it. So, we had it built and it kind of just happened over time. And we had a lot of people asking, "Hey, how do I, how do we implement this?" and for me, it was hard to get it into that mindset because it just kind of organically grew and we found things we didn't like and we tweaked them. But now that they built off of this program that we built and improved it in a lot of ways and put it in a format that you can simply implement it fairly easy and make it successful pretty quickly.

Krystal Hobbs 30:11

Amazing. Trey, there is so much in this interview, I know that our listeners are going to want to learn more about you, and probably ask you some questions about all of this. So what's the best way for them to connect with you?

Trey McWilliams 30:27

Through email, it's trey@mcwilliamsandson.com, email me and I'll be more than happy. If I'm not the right person, I'll connect you to TeleTech or whoever is the right person.

Krystal Hobbs 30:37

Perfect. And we'll make sure to include that in the show notes as well. So if you're listening, you can go to beyondthetoolspodcast.com and we'll link everything there. This has been awesome. Trey, thank you so much for sharing your insights with us.

Trey McWilliams 30:52

No, I enjoyed it, Krystal. Anytime I get back to the community that's honestly given me so much, I love doing it.

Krystal Hobbs 31:03

Thank you so much for listening to this episode of Beyond The Tools. If you liked what you heard, please subscribe, rate, and review wherever you get your podcast. I'd love it if you could also share this episode with a fellow contractor who is ready to get off the tools and grow their business. And if you want more leads, sign up for our email list at reflectivemarketing.com where we share weekly marketing insights that you can't get anywhere else. I'm Krystal Hobbs and I hope you'll join me on the next episode of Beyond The Tools. See you next time!