



Minutes of EGSA DD Committee Spring Conference – March 23, 2015

Start: 2:00 PM Eastern - End: 3:45 PM Eastern

Location: Jacksonville, FL

Organizer: Lyndon Risser, Kurt Summers

Attendees: Per Roster

Minutes Respectfully Submitted By: Chad Youkers

Attendance

- Sent roster list around
- Check for accuracy – make changes / additions as needed
- Linked-In opt in

PowerPoint – Org. Chart

- Looking for plenty of Volunteers
- Working Groups
 - Technician Apprenticeship Programs – 2015 – 2017
 - Chair: Chad Youkers
 - Technician Lifetime Achievement Award – 2015 – 2017
 - Chair: Bob Piske
 - Technician of the Year Award – TOYA – 2015 – 2017
 - Chair: Al Powers
- Board Liaison – Rick Morrison
- Vice Chair – Kurt Summers
- Secretary- Chad Youkers
- EGSA Staff Liaison – Kim Giles

First Time Attendees

- Make changes as necessary

Meeting Ground Rules

- We agree... to leave our EGO's at the door!
- We agree... to create value for Generator Dealers and Distributors to grow EGSA products and services
- We do not... use this platform to sell anything but EGSA value and services
- We are committed to... stick to our agenda and park your ideas and suggestions to better serve our members with excellence

EGSA Mission

- Under the leadership of its Board of Directors and operating through its various committees and staff
 - o EGSA strives to:
 - Educate
 - Provide networking opportunities
 - Share relevant knowledge and trends with Industry Professionals including manufacturers, distributor, dealers, engineers, manufacturer representatives, contractors, integrators and others who serve the Industry.
- To provide an environment where
 - o On-Site Power Generation Industry Experts Unite and Share knowledge to drive the Industry to higher levels of Service and Performance.

EGSA Goals

Provide... the On-Site Power Generation community with education and industry enrichment

Maintain... financial viability to ensure a strong EGSA future

Develop... programs that promote long-term membership value.

Agenda

- One Page Plan... What we committed to deliver
- Goals and YTD Performance Report
- TAP Rollout... Technician Apprenticeship Program
- TOYA Updates... Technician of the Year Award
- 5 Minute Setup Break...
- Best Practices Panel... Customer Service
- 3 Year Initiatives... Mission Bay Breakout Group Results [pe it in here](#)

2015 – 2016 DD Goals

100 / 500 / 1500

100 - Conference Attendees (66 Mission Bay)

500 - DD Members (YTD 277)

1500 - LinkedIn Industry Professionals - YTD 1,300+

Linked-In

Fast Facts:

- Over 500 joined LinkedIn since Mission Bay!
- EGSA has 655 Paying Members
- 277 are DD's... We make up 42% of paying Members
- Content is Limited to Educational Industry Relevant

- Contributors Needed! 6 Month Opportunity

TAP

Chad Youkers gave presentation on TAP program (30,000 foot view).

Explained the purpose, working group members and objectives

Objectives:

- Provide an EGSA sponsored and clearly designed path that will attract students that are attending, or planning to attend, a Trade or Technical School, to choose the OnSite Power Industry as their Career.
- Promote the OnSite Power Industry as a very viable and lucrative career path that has limitless possibilities Worldwide
- Provide a mutually beneficial path for up and coming talent to work with EGSA Member Companies to fill our ever-expanding void
- Allow all EGSA member companies a chance to participate

Goals

- Course definition and timeline for Board approval Spring 2016
- 3 year Apprenticeship Program from Classroom to Field – with EGSA Journeyman Certification as the goal
- EGSA Training Materials
- Partner with interested Colleges, Institutes and Schools to mobilize
- Partner with tool manufacturers to create attractive tool packages to offer students
- Increase EGSA Member value by providing pool of young talent to fill the ever-increasing lack of technicians

Examples

- Gave two examples of how we currently see this program looking

Huddle

- Announced huddle for 3-24-15 – At 7:45 AM to meet to start forming working group

TOYA

- o Technicians are our heart and soul of a servicing DD
- o Team TOYA consists of:
 - Al Powers, Keith Heid, Aaron Yates, Rich Hodgkins and Tom Wein
- o The WHY
 - Increase awareness of generator technician career track by recognizing industry talent
 - Promote and award excellence
 - Member Tool – For EGSA Members to reward top performing technicians

- Member Tool – Creating an industry standard for us to measure Tech performance and behaviors
- What's in it for you?
 - More engaged workforce. If we reward excellence – will get more of it!
 - Increase our talent pool
- Looking to add to Working Group and certainly the Jury – If interested – please see AI

Lifetime Achievement Award – Bob Piske

- 2011 – Vern Taylor – a technician with Gen Tech
 - Started in 1995 with Gen – Tech
 - In his 60's
 - Worked as a technician, out of his truck – on call
 - Went back in hospital and died on December 31, 2011 – unexpectedly
- Many other examples like Vern all over the country
- Need for recognition of technicians that do the heavy lifting to be recognized for a lifetime of achievement
- Bob asking if we are ready for this or do we need to tweak the TOYA and TAP
- Overwhelming support was given

Customer Service Panel

- Kurt introduction to the Customer Service Panel
- Keep the panel discussion going on Linked In!
- Customer Service Panel Introduction
 - Will Ferrigno – President – Assurance Power System
 - Keith Heid – Sales Manager – Fidelity Power Systems
 - Mike Hilger – Service Ops Manager – Arizona Generator Technology
 - Glen Howard – Product Support Sales Manager – Ring Power
 - Richard Knittel – VP Technical Services – Prime Power Services
- Question 1 – Customer Retention & Loyalty
 - Mike Hilger – Sales staff seem to get all the accolades. The retention and loyalty happen after the sale via the service provided. Retention is important for growth. Takes group effort to keep moving forward. One chance to make a good first impression but there are many ways to be remembered. Make it easy to do business with. Requires one to be very proactive. Promises made but not kept is remembered by the customers. The ease of doing business is paramount. Every group and department manager need to work together and the retention and loyalty will follow
 - Kurt: Richard – how does your company handle the group aspect of the communication and ease of doing business
 - Richard: Focused approach. Miscommunication to customers is the root of most problems. Must have clear communication and values from your company as to the culture and how the techs present themselves. Reward and punishment systems need to be in place and adhered to. Needs to be total honesty to the customer. Don't want to remember what the lie was.
 - Kurt: Customers appreciate honesty. Audience question: How you pursue customers as they are lost?

- Richard: Approach taken with client is to advise them that “we’re still here for you”. All customers treated as relationships. Apologize, communicate and be polite and civil.
- Question 2 – Response to a Service Failure
 - Will: Service retention is one of the most important function. Tracking and keeping track of this is important. Metrics shouldn’t be historical but leading. Always looking for testimonials. Try to document them all as they represent valuable marketing tools. Story about a recent failure. One of best technicians. Taking care of Property Manager. Made an improper diagnosis for a failure. They brought in another company. They incurred costs on the customer that were not needed. Will didn’t hear about this until much later. “Big Boss” of Property Management Company inevitably came. Went to lunch and the customer confronted them about it costing them money and expecting them to do the right thing. Caught a bit off guard. Honesty and mistakes are made, but the accountability are key.
 - Richard: Quick comment – When the tech made the misdiagnosis – Need to own up and see where we go from there. Need to have the culture that allows a technician to admit when they are wrong.
- Question 3 – Approach to Preventative Maintenance Agreements
 - Richard: Independent Service Provider. Very adamant that PM sales are not just to get them in the boat for additional and emergency repairs, etc. Feels that this type of mentality shows that your regard to the PM’s is substandard. PM’s become a commodity and highly competitive and difficult to make money at.
 - Kurt: How are additional services accounted for?
 - Richard: Business model is that the techs do quote and recommend belts, hoses, etc. Would rather defend “over quoting” than to try to depend a failure. Had a situation occur where a customer confronted with several deficiencies that happened that likely caused a failure. It was easy to go back and ask them to read the reports where the quotes were 3 years old in some cases. If the reports would have been read and adhered to, this would have been prevented
 - Glen: Service Agreements are two-fold. All inclusive or quoted, “pay as you go”.
 - Keith: When a contract is lost – it is kept track of to try to get the bid back.
 - Kurt: How many have dedicated service sales people? All
- Question 4 – Meeting Customer Expectations
 - Keith: Customer often times have extremely high recommendations, up to and including complete replacement of entire unit. This is especially true with high volume customers. Ten years ago, customers were a lot more reasonable. Manufacturer was part of a team effort to allow replacement in this case. Customer was not going to allow any further “experimentation”.
 - Will: Communication meetings that become true partnerships become the best customers. One of things that is often not done properly are requests. Not being specific. Kick off meetings are worth their weight in gold in the long run. This is great for the Service Salespeople to spearhead.

- Mike: Customer expects you to know their facility when PM is quoted. If any repairs are needed, they would expect the unit to be repair at THAT visit. AWA (additional work authorization) – allows for small repairs to be made, basically without asking.
- Audience Question – How are questions trained
 - Glen: 18 – 24 month apprenticeship program. They are assigned with senior tech.
- Question 5 – Recruiting and Retention
 - Glen: Head hunter that is constantly looking for talent. Internal testing is handled by training department. Sales recruiting: Loves giving younger guys opportunity. Attitude and work ethic mean most. Promoting from within with techs to sales has worked for them. Retention: Knowing your team – what makes them tick, etc. Take care of employees and they'll take care of you.
 - Keith: Good success with younger sales people to fill void. Engineering schools – particularly Mechanical Engineering schools. Look for Engineers with personalities. Give them a shot. Younger people tend to pick things up pretty quickly. All additional training is in house. Most is on distributor level. EGSA schools.
 - Richard: Plug for EGSA. The reason he became involved was the Technician Certification Test. Took the practice test to find deficiencies in their technicians. Put financial incentives in place to pass the testing. One of these was to beat Richard's score. Richard missed 4 questions.
- Audience Questions
 - Compensation: How are sales people compensated?
 - Will: Salary plus commission on gross margin
 - Keith: Salary with graduated commission plan. Based on quarterly closings. Higher salary given at first. Salary gradually backed down. 1 – 2 years. Flexible.
 - Richard: Sales people are the ones making the money.
 - Glen: Salary plus commission on gross margin
 - Mike: Salary / commission
 - Insurance / Extended Warranty Programs ?
 - Will: Residential side of things – shy away from third party insurance
 - No other comments

Committee Incentive Break-Out Groups

- Check three that seem most relevant
- Combination from Board to see how to attract more attendance

Misc.

- I-Tec – See Linked-In for more information