



Riding Shotgun

I have zero technical skills. I have a thimbleful of financial knowledge (which is luckily all you really need.) However, I do have the smarts to know that your team, the front line technicians, will help you fix whatever is broken in your company. As a consultant, with my aforementioned limited skills, sometimes I run into resistance as I work with clients and their team members. To break down some of the barriers, I started riding shotgun. It was the smartest thing I have ever done, and continue to do. When I ride along, my intentions are...

1. To make a friend.
2. To learn something.
3. To be of service.

When I hop in the truck, we make conversation and the resistance start to melt. I learn about his family. I discover that he is into Nascar or classical music or Wes Anderson films. Then, I ask questions like...

1. If you were in my shoes, what would you think I should know, or do?
2. What are we doing that is getting in the way of you serving customers or doing your job?
3. What keeps you working here?

And he tells me. Every time I ride along I am struck by how powerful and important it is to spend time with your front line team members. They know what's happening and they are the key to fixing problems.

When you ride along, you will find that there are one or two things that a technician is doing – or not doing – that is getting in the way of his being more successful. So, hop in the truck...and see what happens. At the very least, you could get to know each other a little better.

Then, you can build on that relationship. That's when things get really good.

Suppose you have tagged along with Jack at least once. He is a great guy, and has worked for you for a few years. According to his scorecard, he is low man on the totem pole for average ticket. He rarely hits his sales goals. You don't want to let him go. Can you help him improve his sales? Maybe. The ride along is an essential coaching tool for finding out.

Have this conversation with Jack:

"Jack, I am concerned about your average ticket. I'm hoping that if we spend some time together, I may be able to help you improve your sales performance. Are you open to that?"

"Sure, I just don't want to be pushy or force my customers to buy something they don't want."

“Fair enough. I don’t want you do to that either. I do want to make sure that you and our customers have a great experience and that you are offering the best of what we can provide. How about if I ride shotgun with you today? Once we get to the customer’s home, I am going to be quiet. You’re in charge. After the call, when we get back to the truck, I will share my observations. If I find ONE thing that – if you were to do it – may make life easier for you and our customer, may I share it with you?”

“Yes. That would be great.”

Now, as you drive to the service call, set the stage for success. Check for the proper paperwork and review the service call process. Make sure the diagnostic kit is ready and shoe covers handy. Don’t break his shoes. Just help.

When you get to the customer’s house, shut up. Don’t take over the call. Steer the conversation back to Jack. “You know, I haven’t been in the field in quite a while. Jack, what do you think?” Unless there is a life-threatening situation, don’t jump in, even if Jack fails to make a sale, or misses an obvious add on.

Each tech is different. You won’t know what his doing or not doing until you see for yourself. When you ride along, you will spot one or more things that is causing him to fail, or work harder than he needs to. Take note of what he is doing right, and share that. When you are back in the truck, share ONE thing to work on.

“Jack, you are a friendly fellow. Mrs. Fernwicky appreciates that you are a dog person like she is. Offering her dog a biscuit was a nice touch. You are skilled technically. You successfully diagnosed and solved the primary problem.

“Here’s one thing that you could try on the next call. Ask your customer 2-3 questions before you start fixing the problem. Ask about her family and how they live in the house. Ask about the problem she is experiencing, or the level of comfort she has in the house. On the next call, ask at least 2 questions.”

You and Jack can role play a few questions as you drive to the next call.

If on the next call, Jack attempts to incorporate your suggestion and ask a couple of questions, Jack is capable of changing his default behavior. And this is AWESOME. Because chances are very, very good that Jack can improve his performance. You are looking for willingness and a capacity for change.

After riding along over 100 times, I can attest that there are usually just a few things that need to be “fixed” for a tech to start hitting minimum sales levels. IF he is willing and basically capable of doing the required work. Note that it doesn’t really matter which behavior you give Jack. Pick one, don’t give him a laundry list. Pick something that he may be neglecting to do, or doing poorly. You want to see if he will give it a shot. If he does, you are off and running to Jack’ improved performance.

And what if Jack’s behaviors are so ingrained that he can’t change? Or what if Jack is not technically capable? You will find out when you ride along. Then you and he will be able to have a candid conversation about his future as a service tech for your company. It is not OK for someone to be a chronic loser under your management. Your job is to help your team members be successful in their positions.

Jack will help you improve, too, if you ask him to share his thoughts about your business. If you take one of his suggestions and implement it, he will appreciate it. You may even get his agreement to head up the project. Ride alongs are an easy way to gain understanding and buy-in all around.

Tips for Riding Shotgun...

- **Set the tech up to win.** When you ride along, don't pick on every little thing. Instead, help out. Review the paperwork. Recap the procedures, "We call in now, right, to alert the dispatcher?" Open the manual and find the pages that may apply to the call. Ask, "What do you do to get pumped up for the next call?" If he says, "Play rap music," then turn on the radio.
- **Don't rush the tech.** You may notice that the tech gets a lot of pressure from the dispatcher (or you?) to hurry to the next call. Remind him to stay in the moment. And take note of operational issues that are getting in the way of good customer service.
- **Use a Basic Sales Process.** A Sales Process outlines the steps you take to make sure you offer great service on every call. Every sales trainer has a Sales Process, and they are all based on a classic sales outline. Here's an example (from my book, [The Bare Bones Biz Plan.](#))
 - **Opening** – Be ready to go, with everything the tech needs to be of service. When you greet the customer, use good manners. Spend a little time getting acquainted.
 - **Discovery** – Ask good questions and listen. A written checklist helps with a thorough diagnosis, and the tech can explain what he is doing as he goes.
 - **Problem Solving** – Assemble the solutions, with prices, based on the Discovery, and present them to the customer.
 - **Closing** – Ask, "How would you like me to get started?" Then zip it. Be quiet. Let the customer think and respond to his next words. (So many techs never stop talking and talk themselves right out of a sale by confusing the customer.)
 - **Follow up** – If the customer says, "Yes!" congratulate him on a good decision. Let him know what happens next. If the customer responds with something other than, "Yes," follow up with additional questions or reply to theirs.

There is a little "close" between each step. You can help a struggling tech discover where in the process things are falling apart. When the relationship between the tech and the customer is good, it's like a light bulb getting brighter. When it starts to get weird, the light bulb gets dimmer. Help your tech identify those moments. Powerful! (Thanks, Tom Rosendahl, for that awesome tip.)

- **Encourage customers to tag along.** Most techs don't like the customer to watch every move. However, if customers are part of the process, the tech's credibility can skyrocket. And, the tech can use fewer words. Discovering a fried bug in the control panel is bad. If you discover it together, the tech can say, "That's bad. So it that part. I'll put a price together for a new one." Easy. If the customer doesn't want to tag along, encourage the tech to say, "I'll come find you if there is something you should see."

- **Words matter.** I've loved the word, "explore," every since I heard it on a ride along. Let's "explore" our options. Let's "find a way" to make this work. When you ride along with high performing techs, you will learn great expressions that you could share with the rest of the team when you "practice" – not "role play" – back at the shop. (Thanks, Nick Srader!)
- **Technical skills make all the difference.** Techs won't sell what they can't do, or what they don't believe in. You'll have the chance to assess technical skills in the field and get feedback about your manuals and procedures. When you get back to the shop, you can head to the training room and work out the technical issues together.
- **Spend the windshield time.** Meeting the tech on the job is OK. It's 100 times more powerful if you ride shotgun. And keep your phone in your pocket. Spend some quality time together. Get to know him and his family and what makes him tick. Consider getting to know your tech so well that you could never be on the TV show Undercover Boss.

If he is willing and basically capable, you can help your tech get better. The ride along is key. Your customers WANT to buy from your tech. They don't want to call three people. They don't want to wait to have the problem fixed. Your service tech is set up to win. What he does and says makes all the difference to his success. What a wonderful experience it is when someone on your watch improves his or her performance.

NOTE! Your critique is given in the truck as you travel to the next job. Never jump in and take over the call (unless someone could die if you don't) and don't criticize the tech in front of the customer.

After Riding Shotgun for a week or two, you will determine that the job and the tech are not a good fit. It may only take a few days. It's OK. Be real when you talk to him about his career. Nobody likes to lose. Move him to a position where he might be successful. Or let him go. It doesn't reduce the value of a person one bit if he doesn't work for you. Let him go be successful at another company or another job.

And if the tech ROCKS IT on the ride along? Brag on him. Highlight a few things that he did well, and get specific. Ask him to share at your next Tech Sales Meeting. Thank him for a job well done.

Still not sold on the Ride Along or Side by Side? In twenty years and over 100 "Shotgun" experiences, here's what I know for sure: Every time I have hopped in the truck, I have thought, "That was the best use of my time today. I should do this more often." It's an opportunity to fall in love with your tech. And he can discover just how much you care.

One more thing! If you ride shotgun, you buy lunch. 😊

Adventures to share? Questions? Aha moments? Email me at contact@ellenrohr.com

PS...I used he and him instead of she and her. No disrespect intended. Just made the writing easier. 😊

Xo\$, Ellen