

**MCAA25**



# How to Create Your Service Dream Team

Lindsey Grilec, Mike Hupp,  
Ryan Leahy and  
Adam Wallenstein

Wednesday, March 5<sup>th</sup>  
9:15 a.m. – 10:45 a.m.

Please let us know what you thought of this session



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# How to Create YOUR Service Dream Team

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# Dream Team Roles

- Dispatchers
- Field Technicians
- Billing Coordinators
- Account  
Managers/Sales
- Quotes/Estimators



# Dispatchers

- Call taking
- Information verification
- Conflict Management
- Technician selection and routing
- Customer follow up

## MSCA Dispatchers Training

# Field Technicians

- What it takes to be a Great lead Technician
- How To Identify Those Technicians
- Navigating through our New Technician field force
- Technician and Client Relationships

## MSCA Field Supervisors Training



# Billing Coordinators

- Multi-tasking
- Detail oriented
- Customer Service Focused
- Correct billing and timely invoicing is critical – they must understand that billing errors and delays cost you clients!

# Account Managers/Sales

- Builds and maintains relationship with client
- Identifies opportunities for service growth; promotes PMA's
- Works closely with other team members (estimators, service techs, dispatchers)
- Solution Based selling

MSCA Sales Basecamp

MSCA Intermediate Sales *(coming soon!)*

MSCA Advanced Sales *(coming soon!)*



# Quotes/Estimators

- Accurately calculates labor, equipment, costs for competitive and profitable bids
- Creates proposal with accurate scope of work and pricing breakdowns
- Works closely with sales and operations
- Keeps up with industry trends and tech advances



# MSCA Sales Classes

## **Sales Basecamp – in person**

Sales Basecamp is where it begins for entry-level service sales personnel. This in person class helps bridge the gap of employees new to sales and/or new to the industry. It provides a strong base on which to build your sales team upon.

## **Intermediate Sales – Virtual - Coming soon!**

This sales follow up course will be available to members who have attended Sales Basecamp. This virtual class will feature one lesson per week over 8-10 weeks, with topics varying from Asking for the Sale, Preventative Maintenance Agreements, and improved communication with your internal team. Each lesson will focus on one intermediate level course taught by MSCA Contractors and Service Industry Leaders .

## **Advanced Sales – in person - Coming soon!**

This in person course will combine advanced sales techniques applicable to the service industry and beyond. Through the use of role playing, sales experts, and industry leaders, your top sales employees can complete their training on a high.



# MSCA Operational Classes

## **NEW!! MSCA Technical Training (with the EMCOR Training Center) – in person**

New for 2025, Classes held at the EMCOR Training Center in Phoenix, AZ will vary from theoretical Chiller classes to small group hands on tear down classes.

## **Dispatcher Training Program - in person**

This two-day program will provide critical Dispatcher skills such as leading technicians rather than letting technicians lead them, becoming the service manager's partner, prioritizing customer emergencies, evaluating technician abilities, and managing their own careers in dispatching.

## **Field Service Supervisors Training Program - in person**

The Field Service Supervisors Training Program is focused training designed specifically for improving the performance of your field service supervisors. Using proven methods, this program will advance skills in leadership, coaching, planning, time management, and communication.

## **Service Managers Program – in person**

Get the management and leadership skills you need to help your company succeed by enhancing your management skills and becoming a more effective leader.



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## Panel Discussion



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