



New Team Member Orientation

# Onboarding Agenda

- Day 1 - At 105 Flex
  - With Daniel:
    - Paperwork in Heartland, Employee Navigator, 401K (if desired)
    - Presentation over company (history, customers, mission)
    - Brief discussion of EvoTrakker, Workplace, spending company money, receipts, etc.)
  - At training kiosk:
    - Skill Mill training over PPE, other safety, sexual harassment
  - FastPace
- Day 2 – At 105 Flex
  - Spend time with various people in the office to better understand the process and their role in supporting you
    - Dispatching (Anggie/Chassidy)
    - Follow-up (Leandrea/Sheila)
    - Quotes (Brian)
    - Parts (Brandon L)
    - ZFM (Zone 1 only – William)
    - Head home/get vehicle ready to go
- Day 3 - ? – Spend time on jobsites with other techs – focus on iPad usage





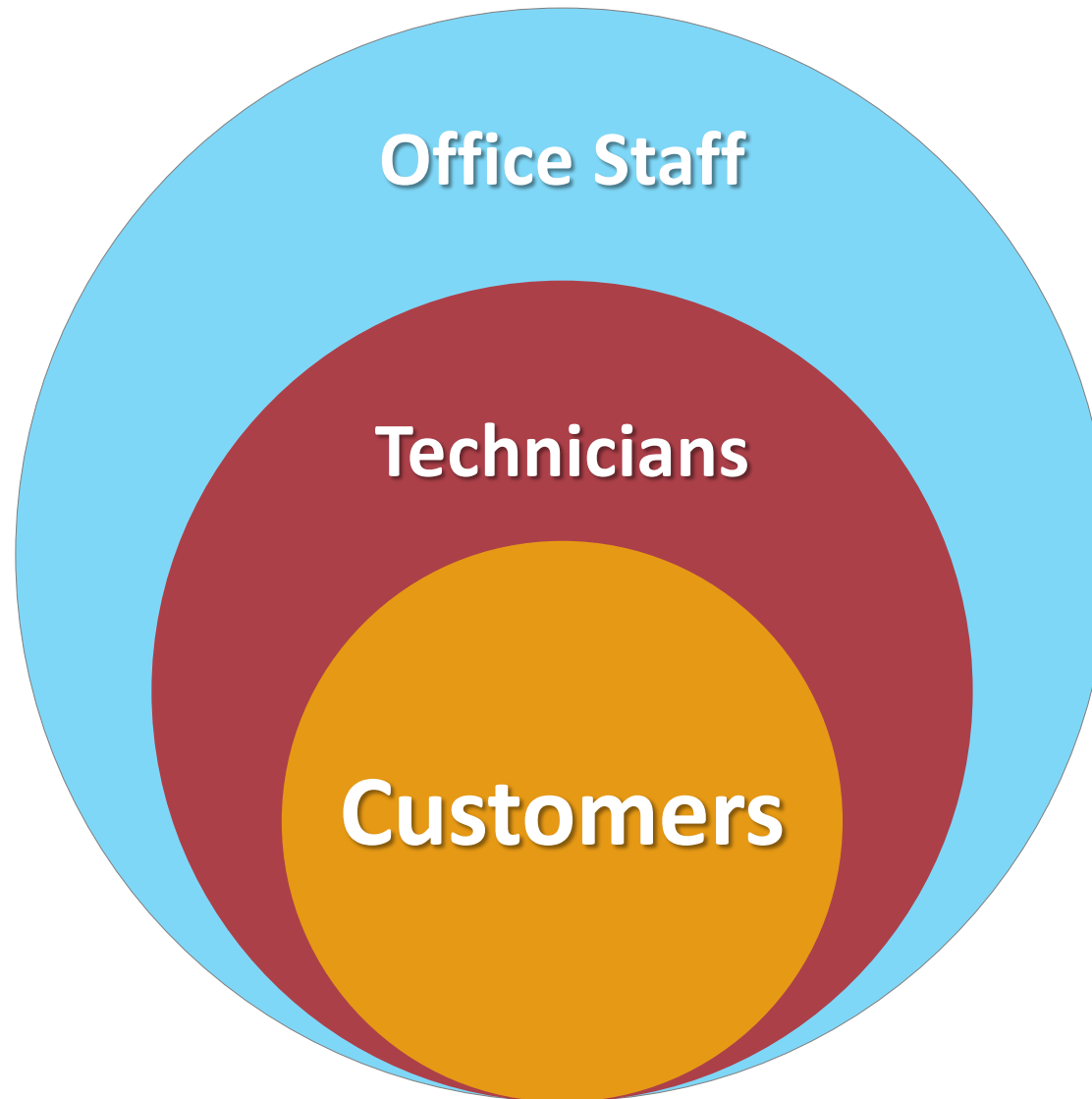
# History of Evolution, Trades that Drive Business

# Evolution Maintenance Brief History - 2013-2023

- Company started in 2013 in Hermitage, TN (Nashville)
  - Eric Greschner founded Evolution while acting as President of a call center – Innovations in Management – IIM.
  - During this period ~90% of Evolution's business came through one call center IIM
    - >90% IIM's business came from one customer – Dollar General – Daniel Stone was the Director of Facilities and Energy Management there
  - October 2015, DG eliminated 25% of corporate office staff
  - October 2016, IIM lost the Dollar General account
  - January 2017, IIM ceased to exist
- January of 2016, moved into larger facility at 1137 Myatt Blvd in Madison, TN (Nashville)
  - May 2016 Eric joined Evolution full time
  - May 2017 Daniel joined Evolution full time
- January of 2024, moved into large facility at 105 Flex Ave in Portland, TN

***Keep this in mind as we go over numbers in upcoming slides***

# Who We Are... Our Core



# Who We Serve – Direct Customers



TIDEWATER



Domino's



DOORDASH



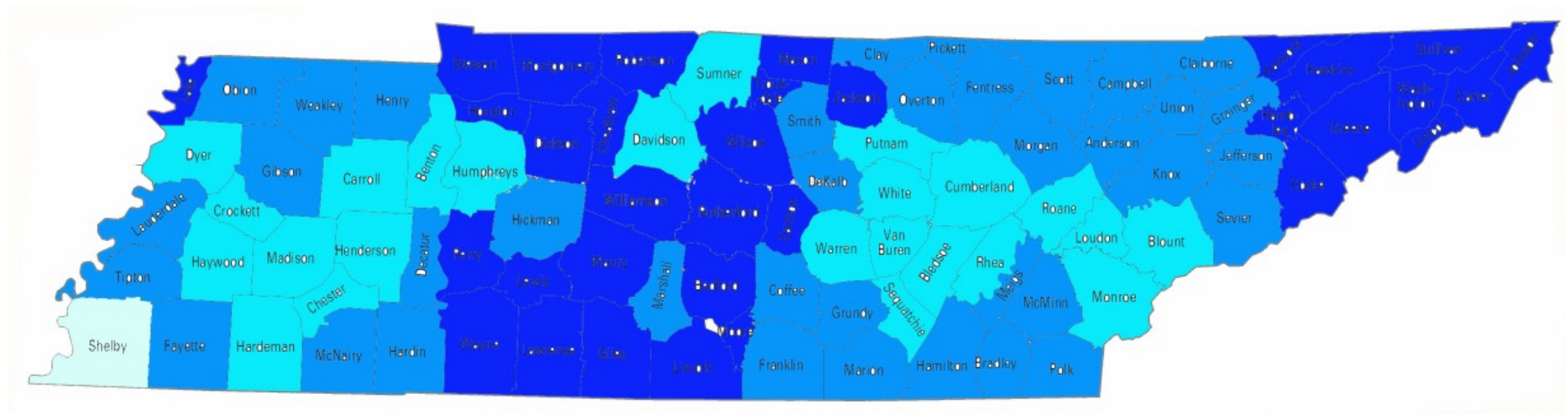
CAVA



EVOLUTION  
— MAINTENANCE —

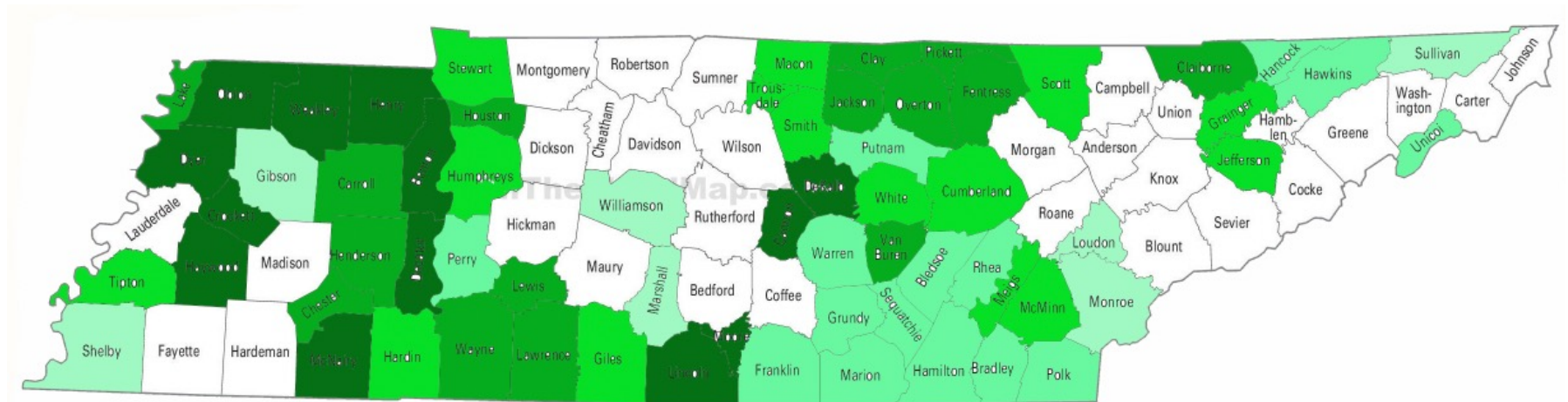


## Plumbing





## Electrical

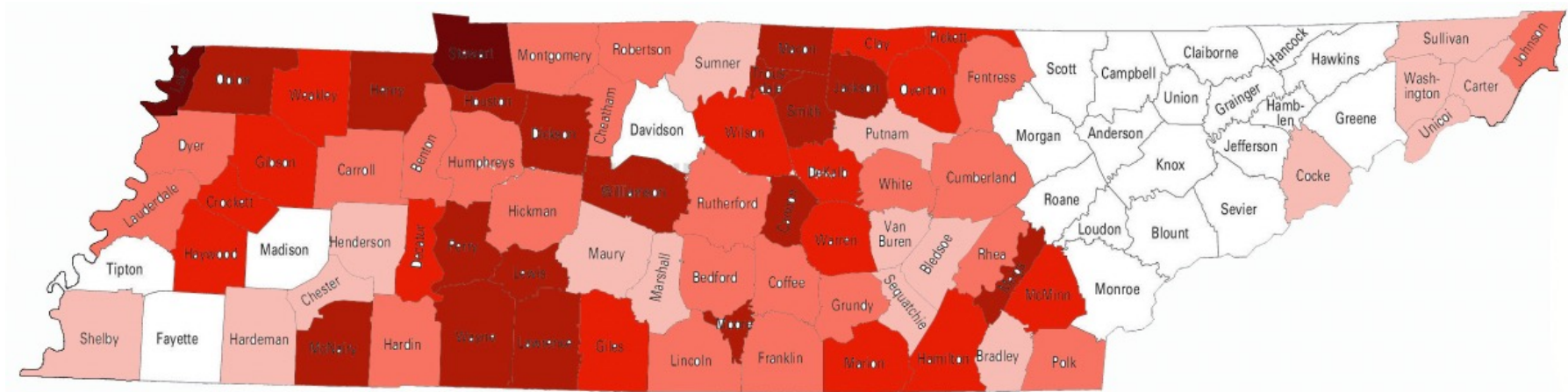


**EVOLUTION**  
— MAINTENANCE —





## HVAC



# Who We Serve – Call Centers



SMS ASSIST

**BOSS**<sup>®</sup>  
FACILITY SERVICES INC.



legacy**group**



**POWERHOUSE.**  
PEOPLE • PROCESS • TECHNOLOGY

 **National Trade Services**



**b** **broadwaynational**



**TRUE SOURCE**  
AN ONPOINT COMPANY





# Who We Serve – Locations

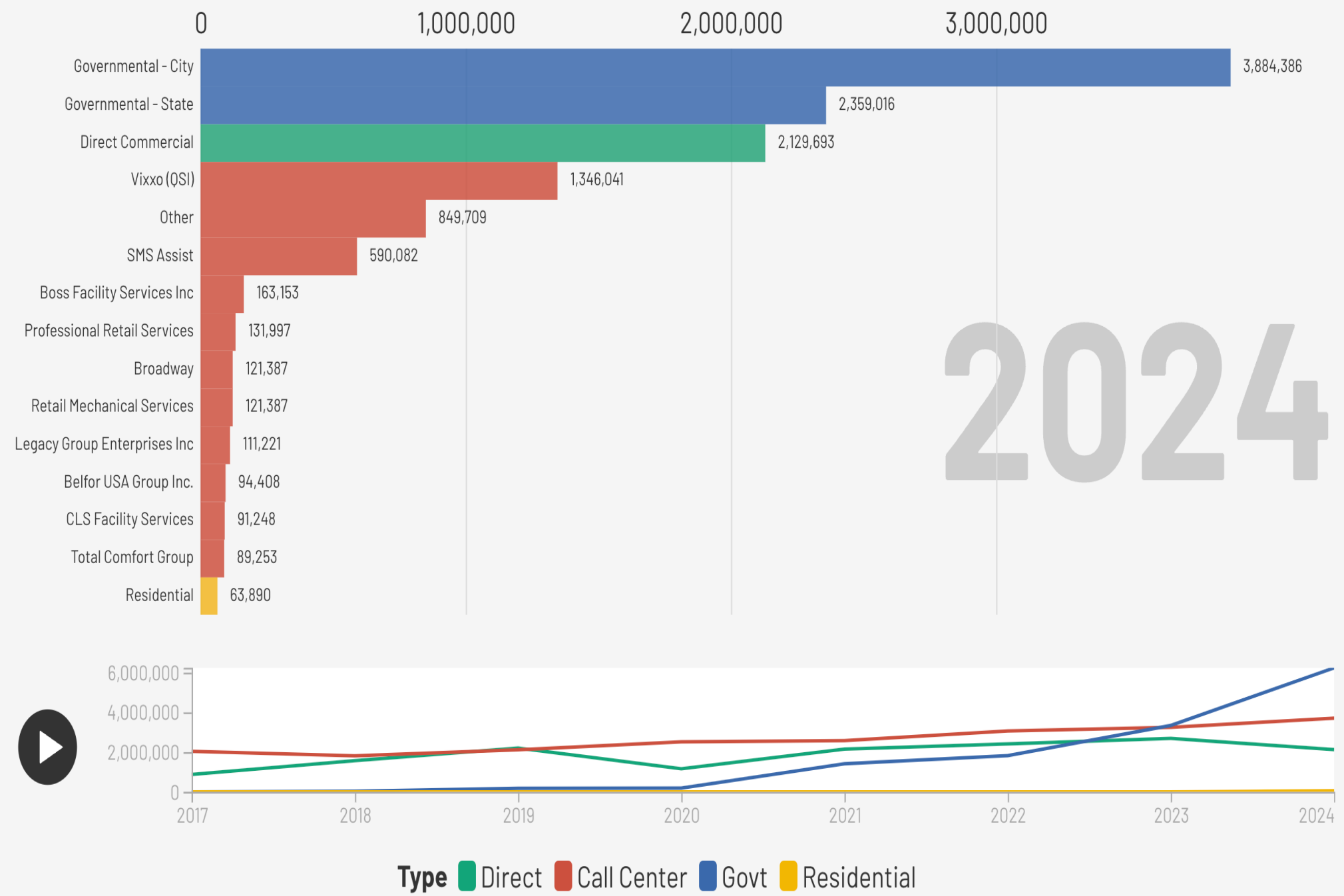


Please enter the URL below.

https:// public.flourish.studio/visualisation/21357951/

Note: Many popular websites allow secure access. Please click on the preview button to ensure the web page is accessible.

# Evolution of Our Business 2017-2024



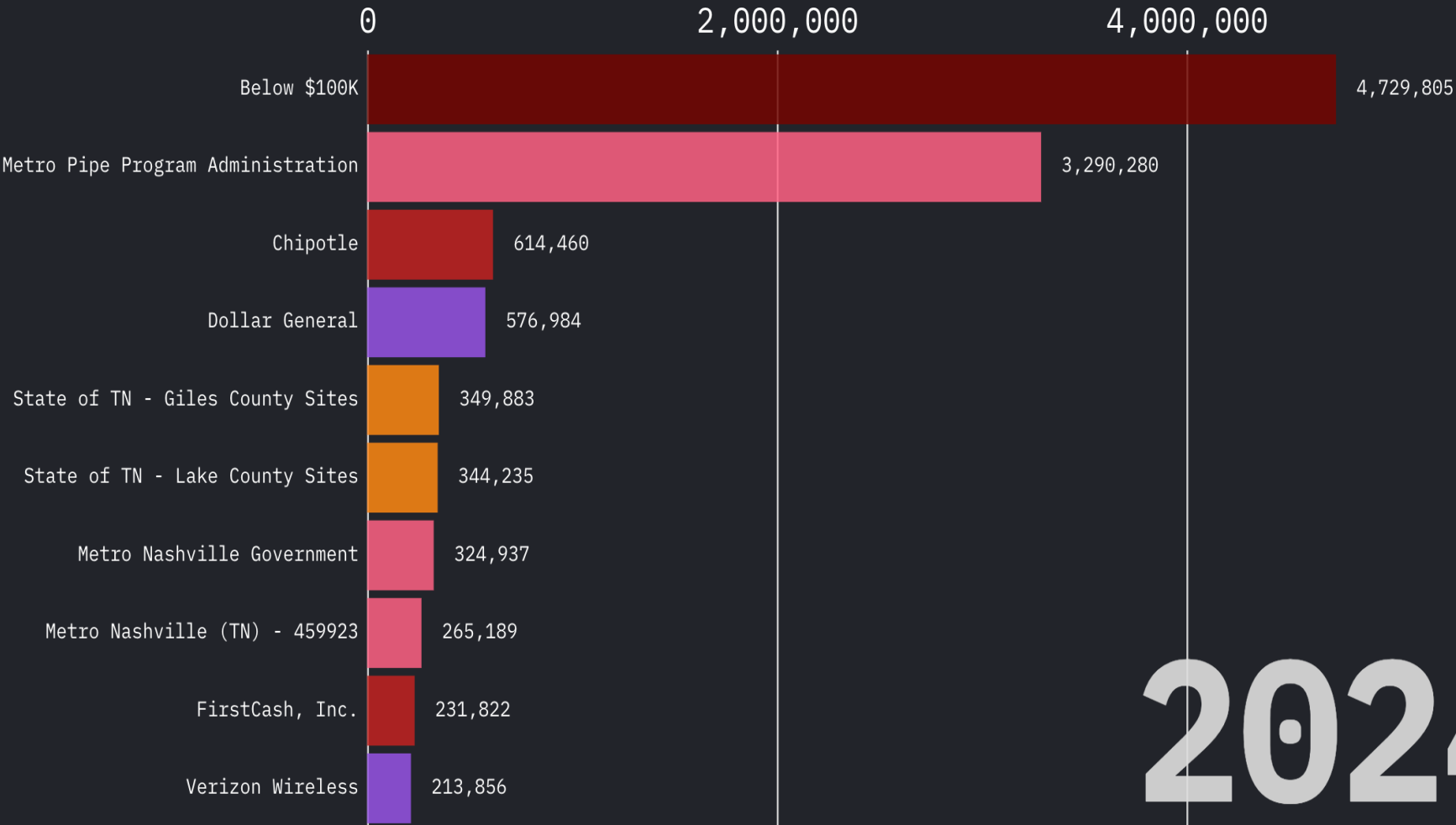
This app allows you to insert secure web pages starting with https:// into the slide deck. Non-secure web pages are not supported for security reasons.

Please enter the URL below.

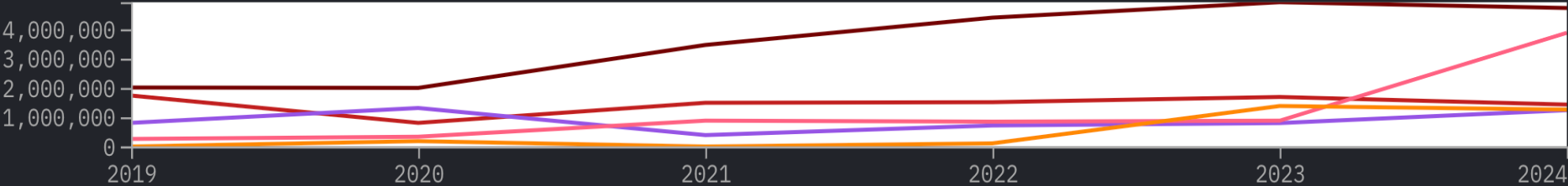
https:// public.flourish.studio/visualisation/21391339/

Note: Many popular websites allow secure access. Please click on the preview button to ensure the web page is accessible.

# Our Largest Companies 2017-2024

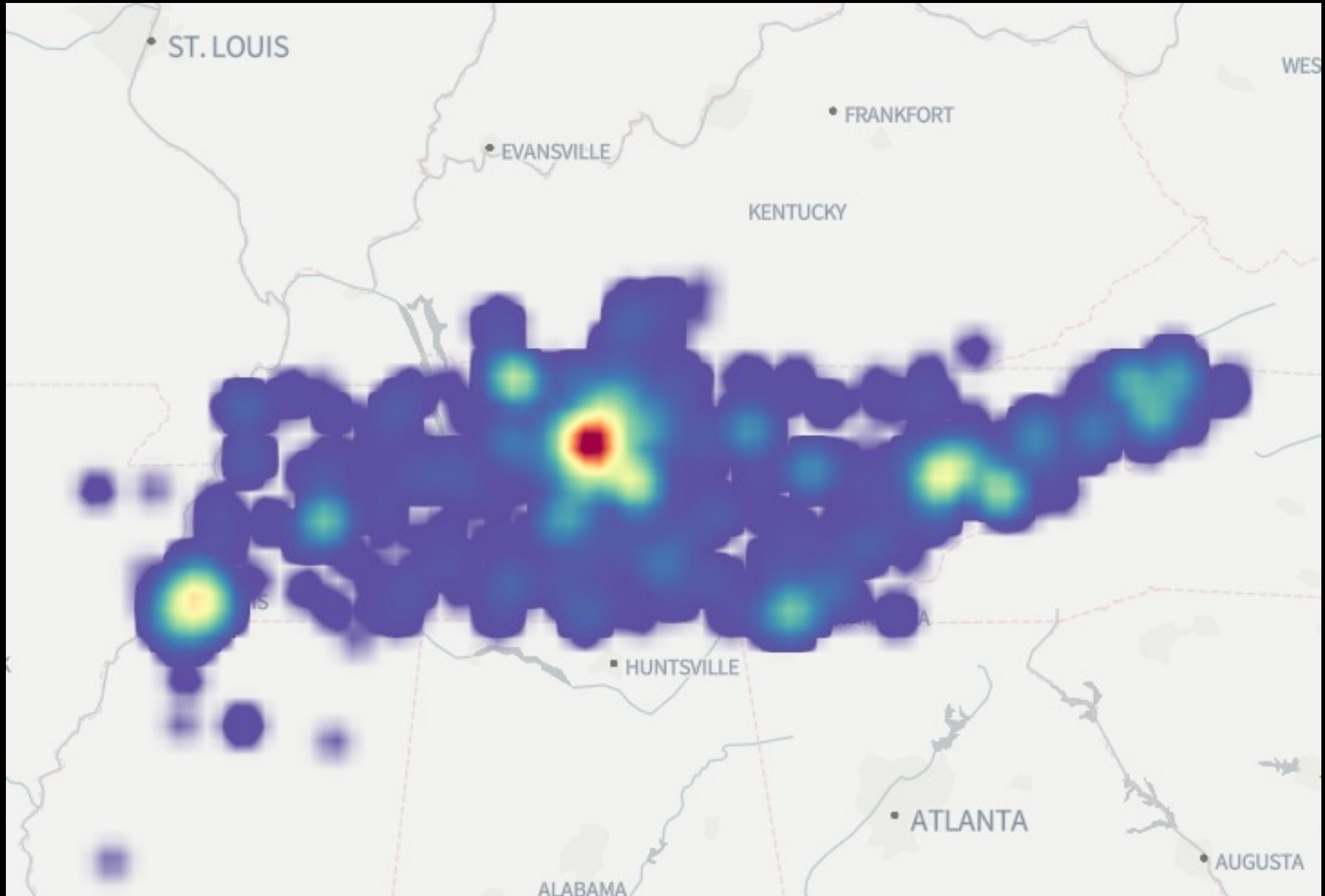


2024



Type ■ Multiple ■ Direct Commercial ■ Call Center ■ Govt-City ■ Govt-ST

# 2024 WO Locations Heat Map



# 2023 Top 20 Locations

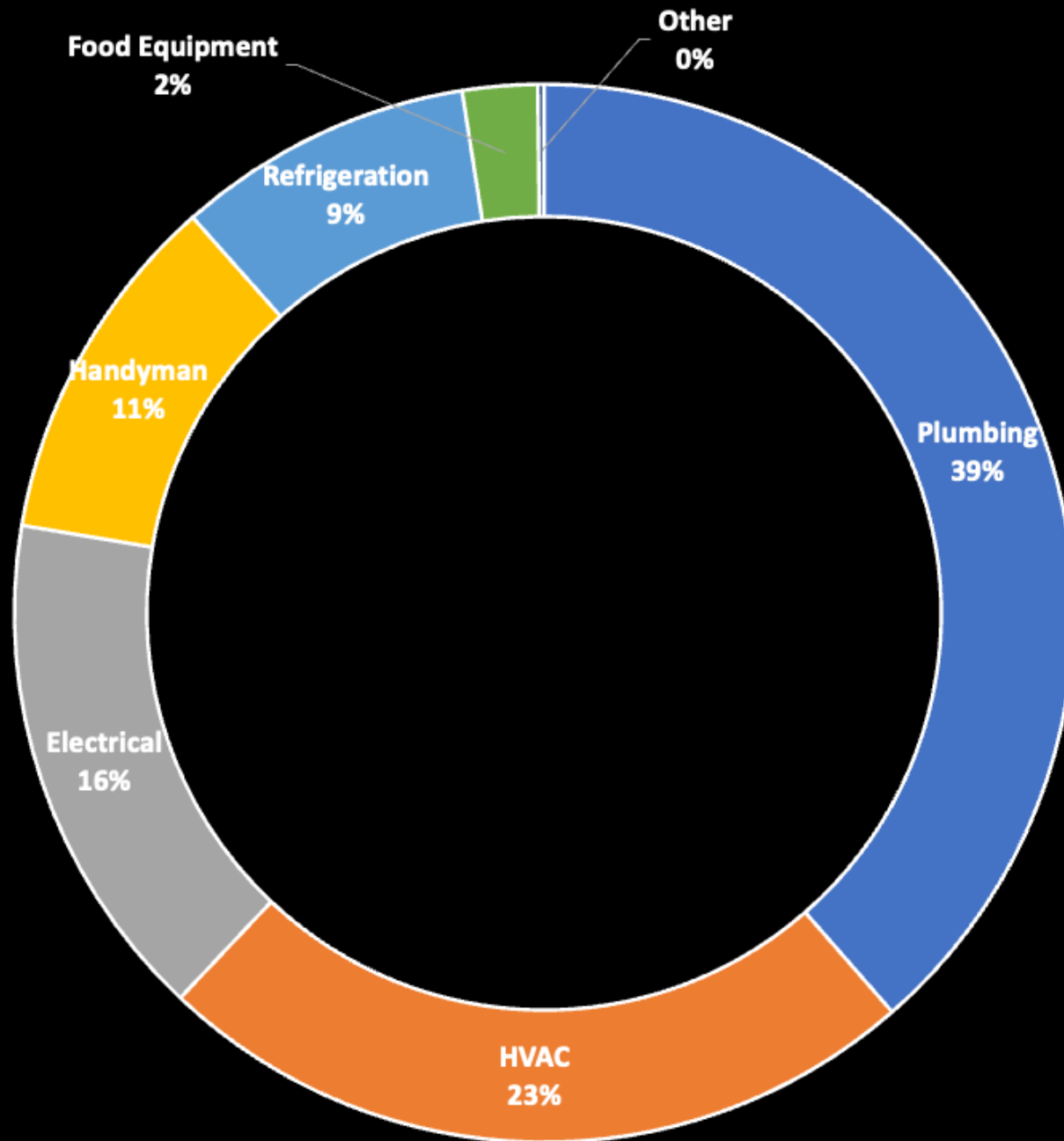
<u>Top 20 Specific Locations</u>		<u>2023 Sales</u>	<u>% of Total</u>
Northwest Correctional Complex - Site #2 - Tiptonville (265) Commissary Building		\$ 282,128.01	3.04%
Combined Support Maintenance Shop (CSMS)		\$ 206,133.47	2.22%
Emergency Communication Center -459923		\$ 180,566.02	1.94%
Chipotle #1687		\$ 178,483.82	1.92%
Army Aviation Support Facility (AASF #2)		\$ 136,617.69	1.47%
Nashville Famers' Market -443132		\$ 103,881.27	1.12%
Northwest Correction Complex - Site #1 - Tiptonville (273) Program Services Bldg (#6)		\$ 98,155.62	1.06%
Juvenile Justice -459923		\$ 90,387.65	0.97%
Johnsonville State Historical Park - New Johnsonville (334) Visitor Center		\$ 85,916.35	0.92%
Tennessee Fire Service & Codes Academy	0.37%	\$ 85,084.35	0.92%
Chipotle #3223		\$ 84,410.64	0.91%
Transportation - Nashville (827) Radio Tower & Equip		\$ 81,914.49	0.88%
Fast Pace Health #10032 (JEFFERSON)		\$ 71,570.20	0.77%
West TN State Penitentiary - Site #1 - Henning (249) Central Control Bldg		\$ 66,391.74	0.71%
Pearl-Cohn Entertainment Magnet High School -7494249		\$ 65,209.45	0.70%
Davidson County General Services -459923		\$ 64,397.28	0.69%
Chipotle #2067		\$ 61,917.85	0.67%
Chipotle #2787		\$ 60,195.96	0.65%
Cash America Pawn #2700		\$ 56,272.89	0.61%
Tullahoma TN National Guard - (551) Fms 07 (00002)		\$ 56,246.27	0.61%
These locations alone represent...		\$ 2,115,881.02	22.8%

# 2024 Top 20 Locations

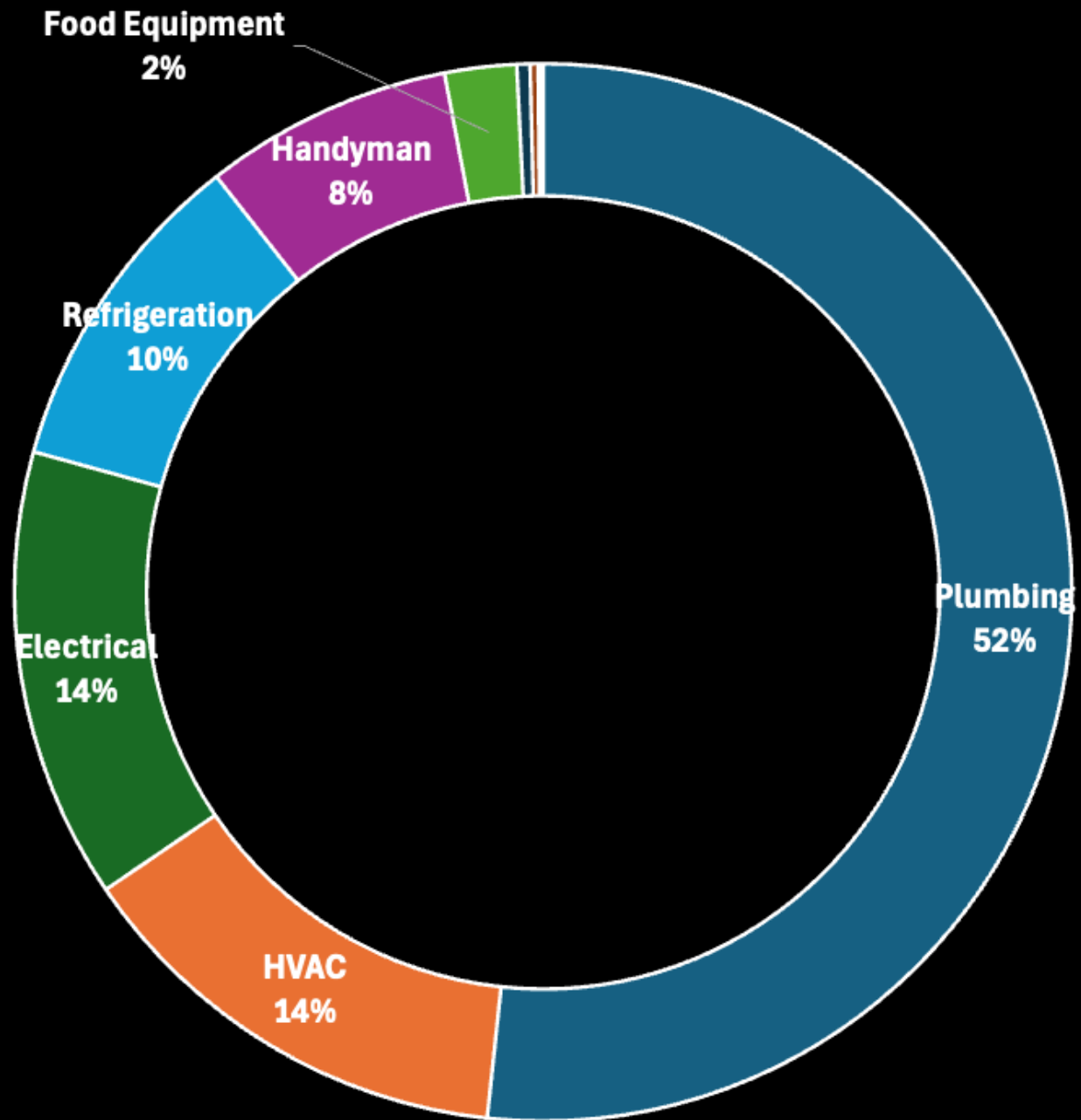
<u>Top 20 Specific Locations</u>	<u>2024 Sales</u>	<u>% of Total</u>
Giles Co- I-65 Ardmore Welcome Center- Vending Bldg (561)	\$ 252,696.05	2.03%
Davidson County Fleet Management	\$ 144,268.70	1.16%
Northwest Correctional Complex - Site #2 - Tiptonville (265) Commissary Building	\$ 136,830.17	1.10%
David Crockett State Park - Lawrenceburg (314) Park Office	\$ 117,378.07	0.94%
Northwest Correction Complex - Site #1 - Tiptonville (273) Administration Bldg. (#12)	\$ 108,884.15	0.88%
Army National Guard	\$ 90,996.19	0.73%
Chattanooga TN National Guard - (551) Admin Bldg (00013)	\$ 87,320.63	0.70%
Pulaski TN National Guard - (551) Armory (00001)	\$ 77,566.69	0.62%
Columbia TN National Guard - (551) Armory (00001)	\$ 72,110.01	0.58%
West TN State Penitentiary - Site #2 - Henning (269) Administration Building	\$ 64,183.21	0.52%
Tidewater, Inc #TN004	\$ 63,155.95	0.51%
Chipotle #2040	\$ 61,222.36	0.49%
Buc-ees #045 (Sevierville TN)	\$ 54,196.23	0.44%
MAC - North Head Start Center # 7564 -459923	\$ 48,496.22	0.39%
Knoxville TN National Guard - (551) Fms 02 (00002)	\$ 48,340.74	0.39%
Northwest Correctional Complex (Tiptonville)	\$ 47,595.62	0.38%
Johnson City TN National Guard - (551) Army Maintenance Support Activity (AMSA)	\$ 46,570.34	0.37%
Winchester TN National Guard - (551) Fms 08 (00002)	\$ 46,354.62	0.37%
TDOT Region II County Maintenance - Athens (653) McMinn County - Athens	\$ 46,180.03	0.37%
Johnson City National Guard	\$ 45,670.37	0.37%
These locations alone represent...	\$ 1,660,016.35	13.36%



# 2023 By Trade (final)



# 2024 By Trade (Final)





# Revenue History

# What does this mean for overall revenue?

2013 – \$138K

2014 – \$1.3M

2015 – \$2.1M

2016 – \$2.3M

2017 – \$2.9M

2018 – \$3.4M

2019 – \$4.5M

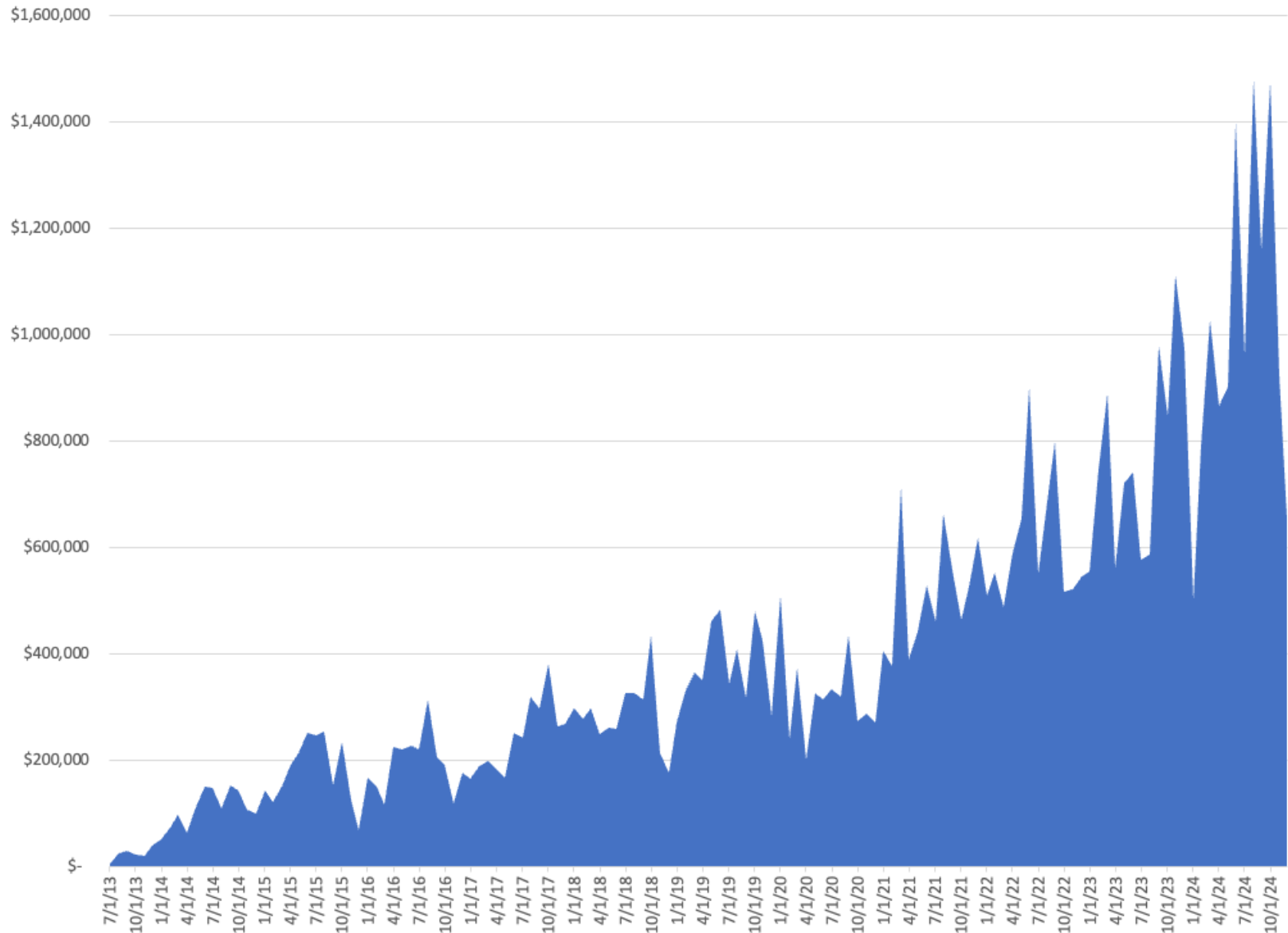
2020 – \$3.8M

2021 – \$6.1M

2022 – \$7.3M

2023 – \$9.2M

2024 – \$12.1M

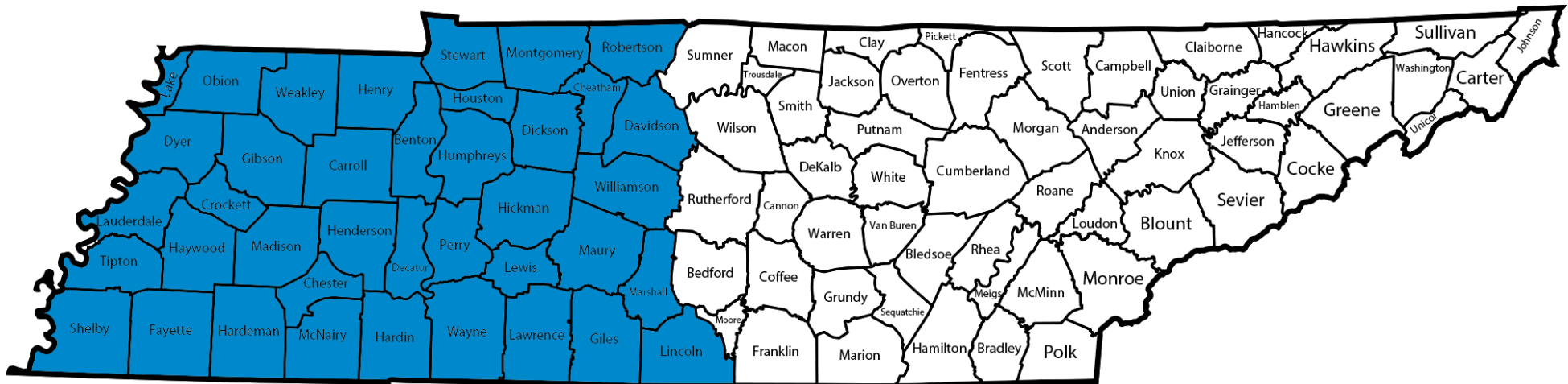




# Evolution Team

# Process of how we serve the customers – Administration

# Operations - How we divide the state

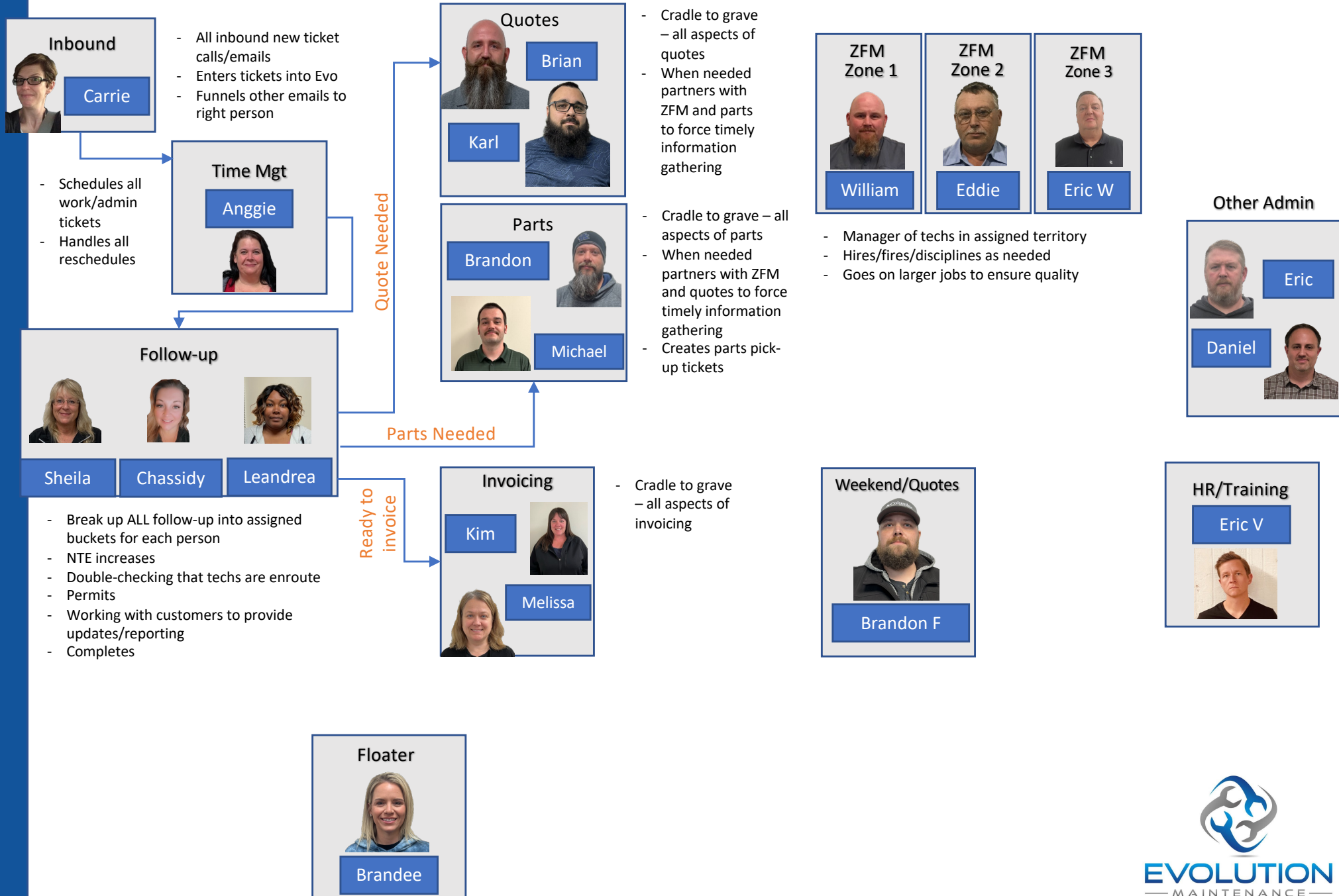


Zone 1 – 21  
technicians

Zone 2 - 21  
technicians

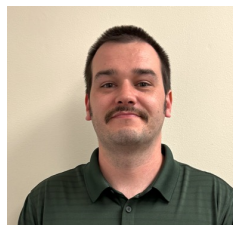
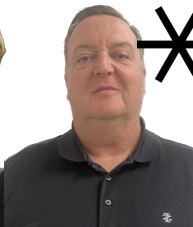
Zone 3 MPP/R - ~13  
technicians

# Operations - Overview of who does what in the office





# Operations – Tenure (By the end of 2025)



EVOLUTION  
— MAINTENANCE —

# Operations – Functional Areas

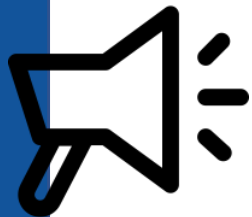
- Inbound Service Requests/Upfront Communication
- Dispatching
- Follow-up
- Quoting
- Parts
- Accounting/Invoicing



**“Improve communications” “clear instructions on who to contact”**

# Inbound Service Requests/Upfront Communication Role Summary

- Customers call (615-649-0622) or us emails ([service@evolutionmaintenance.com](mailto:service@evolutionmaintenance.com)) requesting service
- General inquiries are sent to the methods above asking specific questions
- People in this role act as a point guard; getting the ball to the right player
  - Enters all new tickets into EvoTrakker, leaving them in the “Needs to be Scheduled” status
  - Breaks out the Sign Off form (for those customers that use them) so it can be later uploaded during invoicing
  - Sends other emails to the right functional area
- Other Tasks:
  - Obtaining and maintaining certificates of insurance for all customers



**615-649-0622 option 1  
gets you here**

Line number ↕	User name ↕
615.620.8198	Stearnsman Desk Carrie
615.588.8872	Fox Desk Brandee
615.499.5056	Holland One talk Angie

# Dispatching (Time Management) Role Summary

- Basically, manages activities once the ticket is entered until after the tech leaves the site the first visit. Is involved in return visits (but others typically involved).
- Manages tech hours (ensuring they get the right amount, for now funneling time off requests, calculating payroll each week)
- Other Tasks:
  - TBD



**615-649-0622 option 5  
gets you here**

Line number ↕	User name ↕
615.499.5056	Holland One talk anggie
615.714.3645	Gray Desk chassidy
615.708.6825	Barksdale Desk leandrea
615.469.5998	Scull Desk sheila

# Follow-up Role Summary

- Guides the ticket around information black holes – takes steps to keep the ticket moving and the customer's updated
- Lots of time spent answering emails and phone calls from customers
- Ensures that all tickets switched to "Ready to Invoice" are ready - check portal to ensure in right status, NTE is correct, and hours are reasonably matching EvoTrakker. Make sure tech has provided before/after photos, managers sig and the notes tell the customer the story of what we did
- Other Tasks:
  - Pulls permits required in assigned zone



**615-649-0622 option 2  
gets you here**

Line number ↕	User name ↕
615.708.6825	Barksdale Desk leandrea
615.469.5998	Scull Desk sheila

# Quoting Role Summary

- Takes tech information and gets it into the required format in order to submit quotes to all customers
- Partners with Parts, and our suppliers, to ensure we are covering ourselves and maximizing profits when specifying items for quotes (and also ensuring we use suppliers that will actually have the needed items)
- Other Tasks:
  - Assists with tech questions (Zone Facility Manager is primary tech contact)

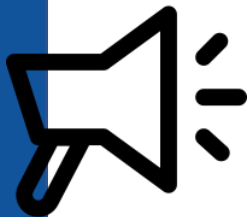


**615-649-0622 option 3  
gets you here**

Line number ↕	User name ↕
615.347.2711	Nuckols Brian
615.961.4240	Baldwin Desk dean

# Parts Role Summary

- Procurement and management of all parts (unless the tech sources it locally) from sourcing to creating the pick-up ticket (Dispatching will schedule it)
- Warehouse management
- Develop and then manage an inventory management process/program
- Other Tasks:
  - Management of Tech Uniforms



**615-649-0622 option 4  
gets you here**

Line number ↕

User name ↕

615.924.0946

Leftwich Desk brandon



# Accounting/Invoicing Role Summary

- Takes all “Ready to Invoice” tickets and get them to the customers in their required format/portals
- Works with customers on late/missing payments (collections)
- Assists with reconciliation of payments from customers
- Management of receipts
  - Reports to techs on missing receipts
- Other Tasks:
  - Assists with other Admin tasks



**615-649-0622 option 6  
gets you here**

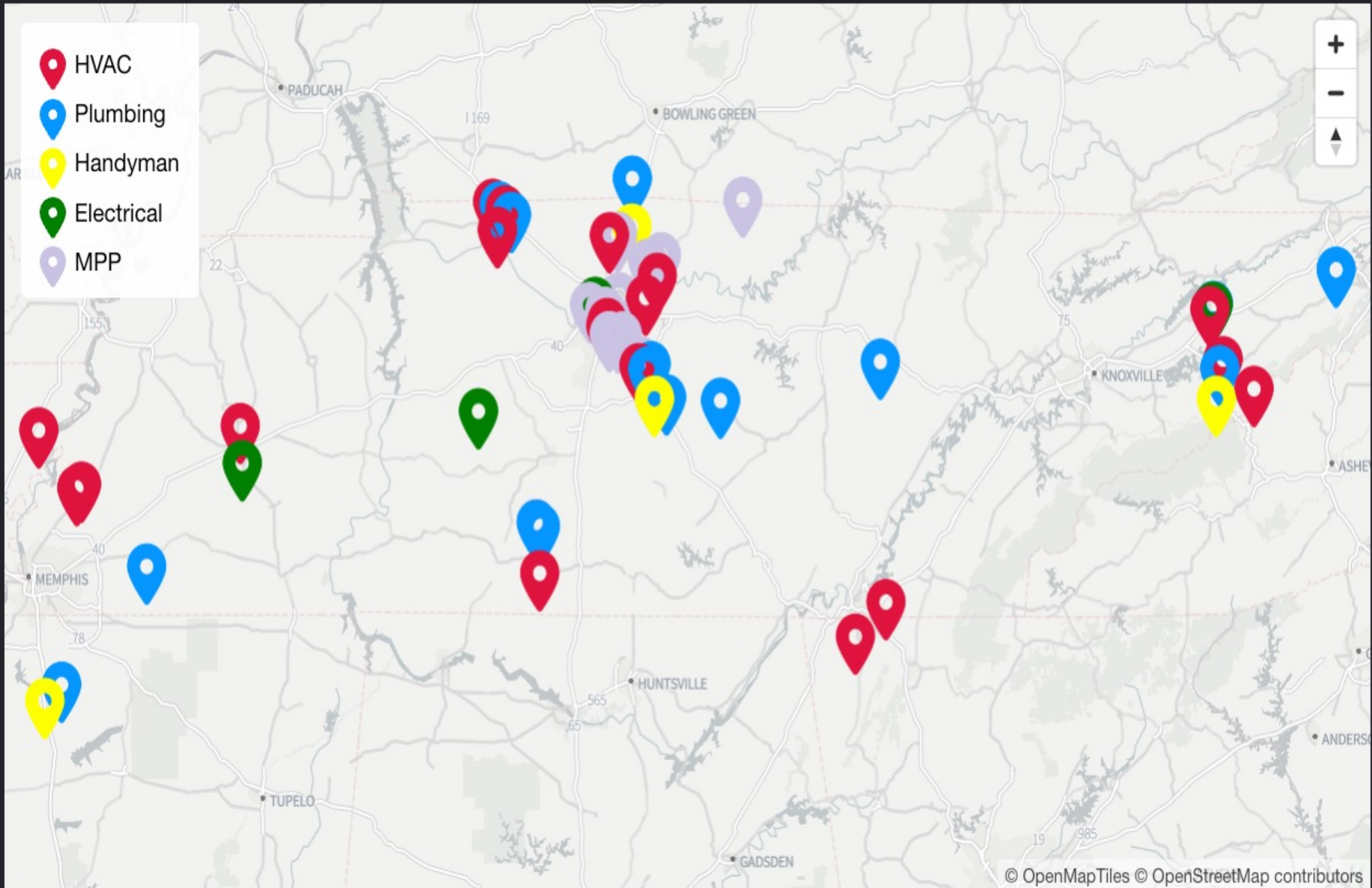
Line number ↕	User name ↕
615.426.9065	Campbell Kim
615.469.5450	Eric greschner Desk



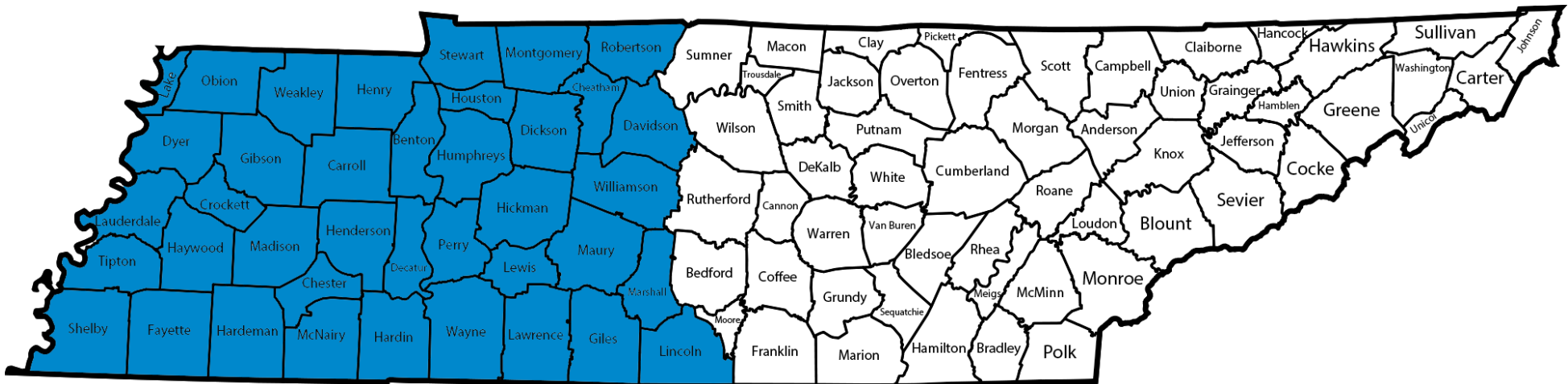
# Process of how we serve the customers – Field Techs



# Evolution Tech Locations



# Reminder of the Zone Changes...



Zone 1 – 21  
technicians

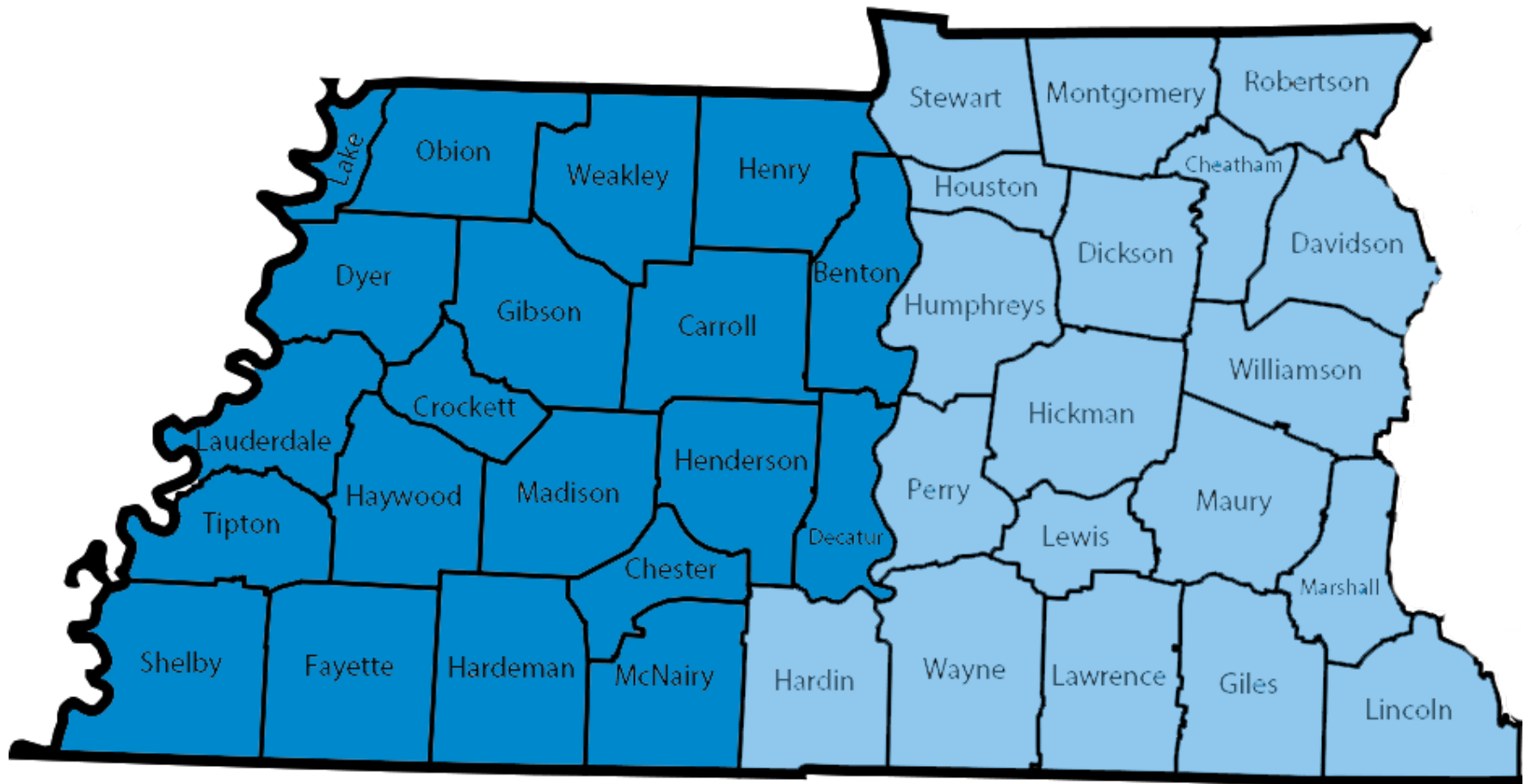
Zone 2 - 21  
technicians

Zone 3 MPP/R - ~13  
technicians



**EVOLUTION**  
— MAINTENANCE —

# Zone 1



✱ Indicates someone who was with Evolution,  
left and came back

# Techs – Zone 1W Plumbers



Chad Cole

Eric Slatton



# Techs – Zone 1W HVAC, Refrigeration, Electrical



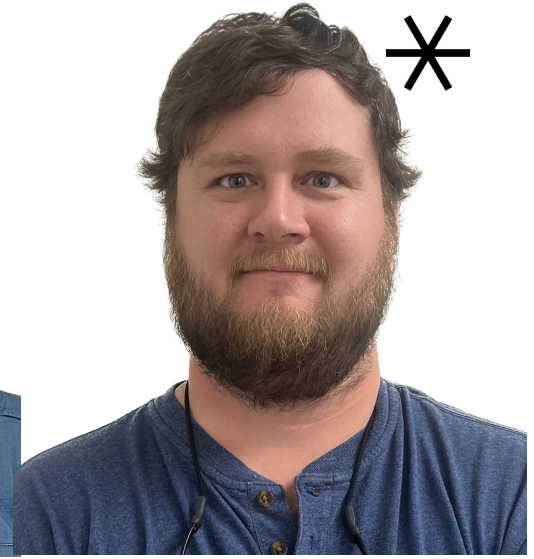
Brandon Kerrent



Canaan Sims



Jonathan Stovall



Wilson Ashmore



Paul Wright

# Techs – Zone 1W – Handyman



Chad Groves

# Techs – Zone 1E - Plumbers



Dave Williams



Dwight Garner



Brian King



Johnnie Brewster



Steven Kopeski



Michael Webster



Owen Garner



Jackson Carter



# Techs – Zone 1E – HVAC, Refrigeration, Electrical



Junior Garcia



John Romeo



Leon Osbourne



Sam Tummons



Terry Miller



Blaike Allen



Wesley Floyd

# Techs – Zone 1E – HVAC, Refrigeration, Electrical

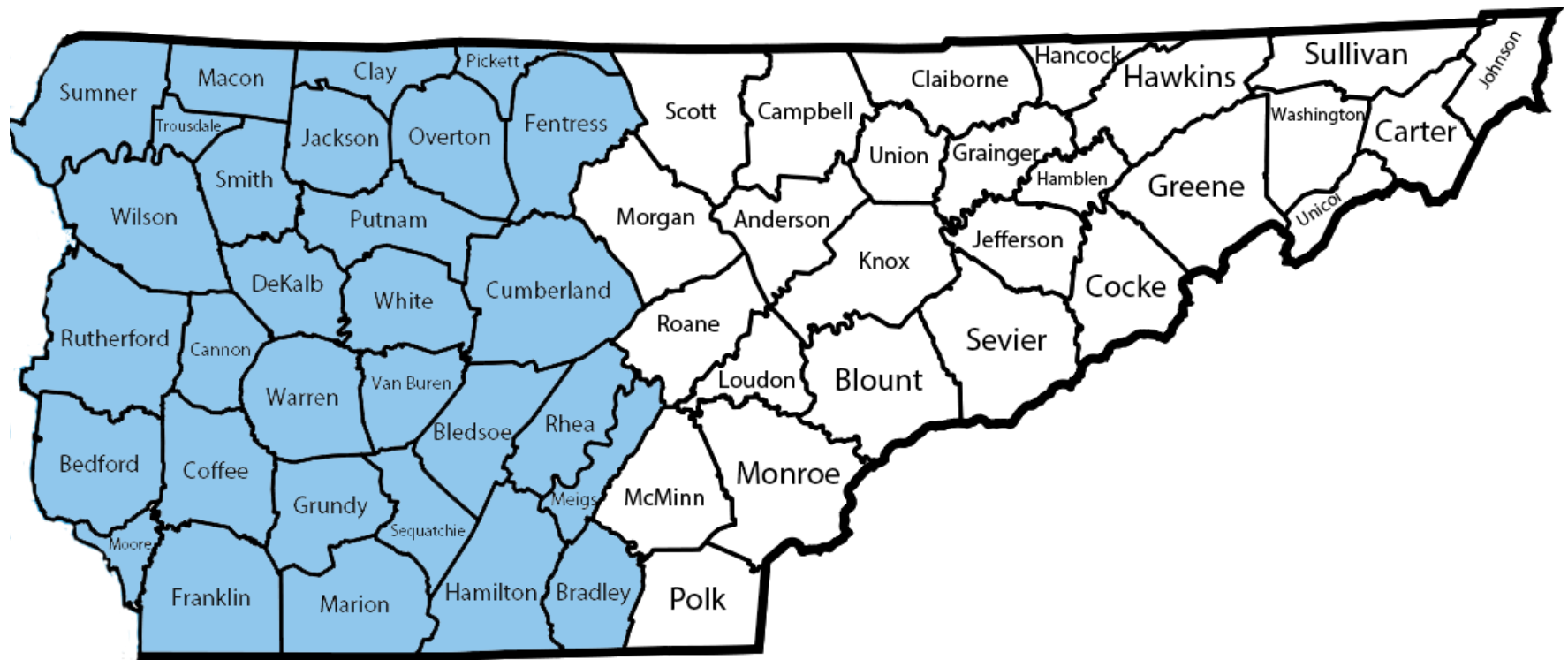


Tim Jackson



Nicholas Romeo

# Zone 2



# Techs – Zone 2W - Plumbers



Dustin Cheek



Anthony Cannon



Ryan Massey



# Techs – Zone 2W – HVAC, Refrigeration, Electrical



Mike Miller

Marquis Wheeler

Ayman Abdulshaheed

# Techs – Zone 2W – Handyman



Susana Marroquin



Shane Poe

# Techs – Zone 2 (East) Plumbers



Todd Ellis

✱



Robert Aiken



Jerome Stubblefield

# Techs – Zone 2 (East) – HVAC / Handyman



Adam Branch



Rene Santos



Sam Baker



Derek Dean



Jesse Kirk



Roger Miller



Andrew Barber



# Zone 3

- Not geographically based
  - Residential
  - Metro Pipe Program

# Techs – Zone 3 – Plumbers Metro Pipe Program



Anderson Ruiz

Trey Lambright

Aaron Middleton

Kaden Johns



Rovante Bowers

Darius Summers

Shaquawn Odom

Deondrian Sullivan



# Techs – Zone 3 – Plumbers Metro Pipe Program



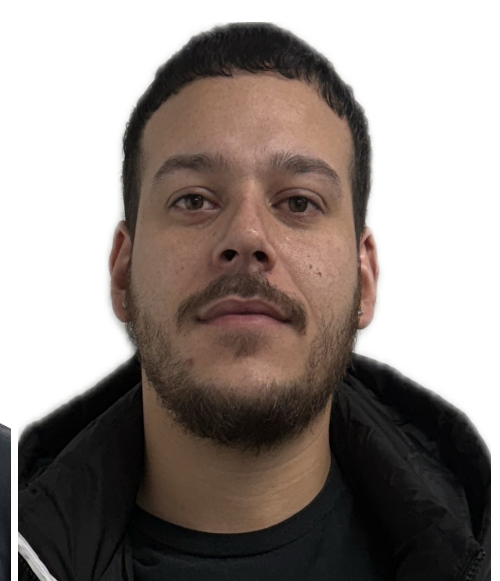
Kenneth Marroquin



Adreane Barksdale



Cody Williams



Jose Torres-Castro



Henry Recarte



Riley Thompson



Emmanuel Woodard

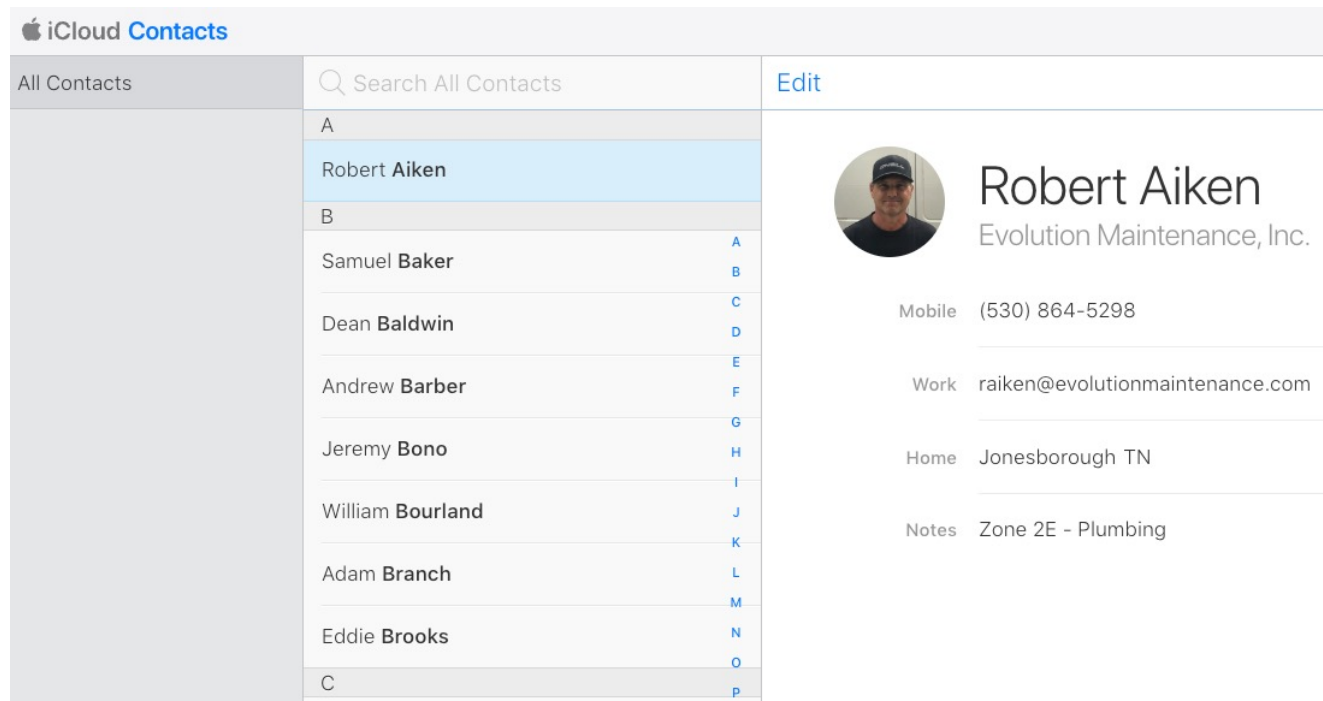
# Techs – Zone 3 R1



Dylan Mabry

# So how do you reach all of these people

- An updated list of contacts (for some reason, a few always say they can't be save) area uploaded contacts to your iPad



- And to specifically reach people in the office...

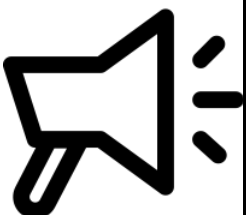


Here is the secret info on how to get to someone's extension...

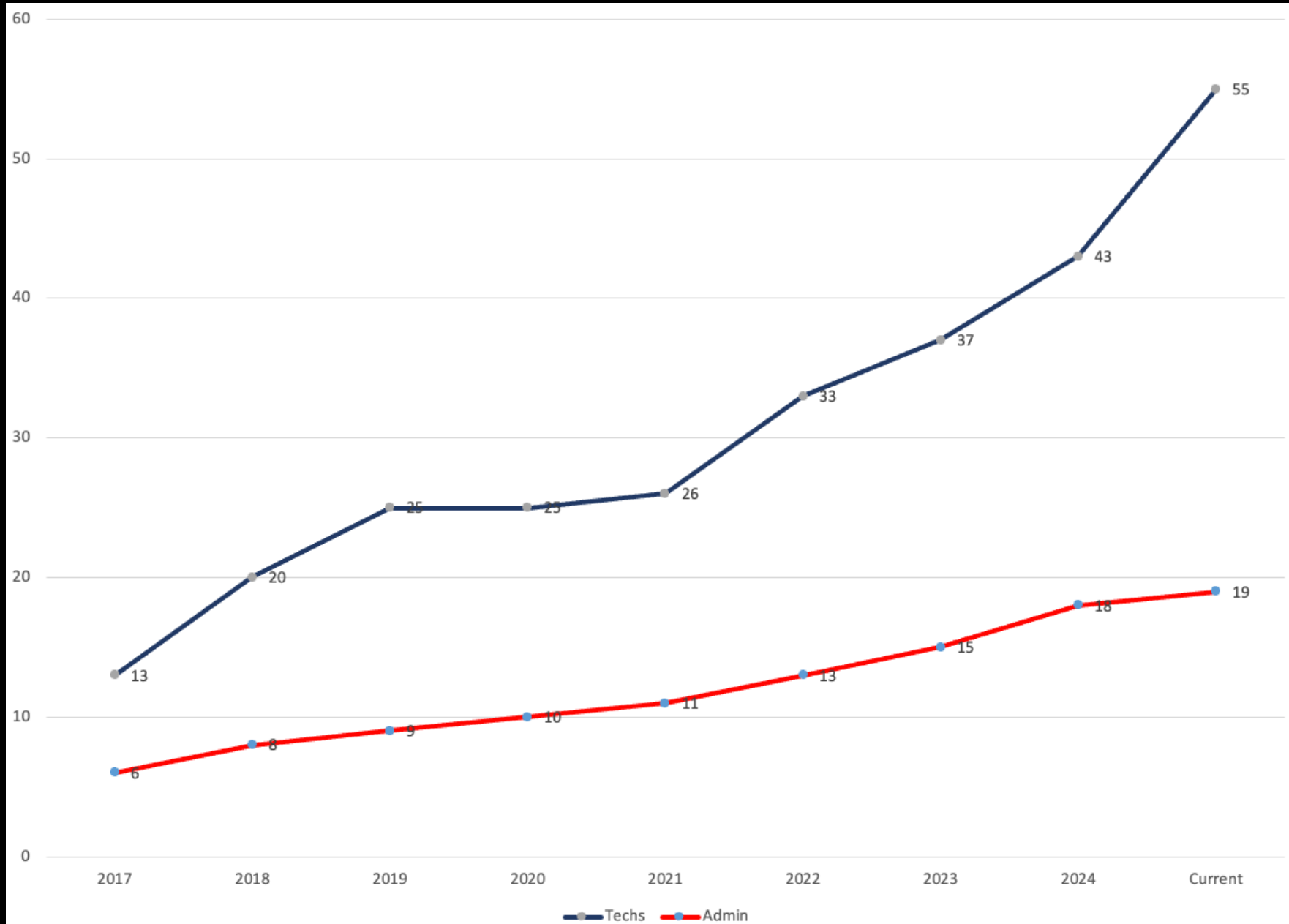
**Call 615-649-0622**

*Choose 7 ( this option is not announced ),  
Then enter the extension below followed by the # sign*

Evo Zone 1 - Middle TN				
<u>Zone</u>	<u>Name</u>	<u>Personal/Ext</u>	<u>Main Trade</u>	<u>E-Mail</u>
ZFM	William Bourland	(615) 970-8264	Zone Facility Manager	wbourland
1	Anggie Holland	301	Dispatching	anggie
1	Leandrea Barksdale	306	Follow-up	lbarksdale
Evo Zone 2 - East & West TN				
<u>Zone</u>	<u>Name</u>	<u>Personal/Ext</u>	<u>Main Trade</u>	<u>E-Mail</u>
ZFM	Eddie Brooks	(865) 548-7200		eddie
2	Chassidy Gray	312	Dispatching	cgray
2	Shelia Scull	308	Follow-up	sscull
Admin				
<u>Zone</u>	<u>Name</u>	<u>Ext.</u>		<u>E-Mail</u>
Admin	Eric Greschner	305		eric
Admin	Daniel Stone	307		daniel
Admin	Kim Campbell	315	Accounting	kcampbell
Admin	Melissa Hogan	313	Accounting	mhogan
Admin	Carrie Stearsman	303	Inbound Call Management	cstearsman
Admin	Brian Nuckols	304	Quotes - Plumbing/Handyman	bnuckols
Admin	Dean Baldwin	314	Quotes - Ref/HVAC/Food Equip	dean
Admin	Brandon Leftwich	311	Parts	bleftwich
Admin	Brandee Fox	316	Floater	bfox
Admin	Eric Vines	320	Special Projects	evines



# Evolution Team Growth





# Team Feedback

**And quite frankly, why we exist**



# Let's Start with Core Tenets

## Buzzwords/Thoughts to Create Core Tenets of Evolution

- Fairness
  - Laid back culture
- Opportunity
  - Growth/training
  - A place to retire
  - Anti-Shithead/Good people (Mindset)
  - Family (as much as work can be)
  - Willingness
- Communication
  - Explaining to the customer why they are giving us their money
  - Between techs and office
- Quality work for fair prices
  - Pigs get fed, hogs get slaughtered
  - Effort
  - Hard Working

# Core Tenets



# Creating a Mission Statement

- What is Evolution's purpose?
- Let's go back to the beginning, Eric G was tired of dealing with companies who did not give a damn... why gloss over it?

***Service by people who give a damn***

If all of us give a damn about the customer, give a damn about our co-workers, give a damn about the work we do, we can accomplish:

- Satisfying customers
- Generating a positive name for Evolution
- Generating a positive name for you
- Pride in work
- Profit



# Workflow

# Workflow

- Customers call (615-649-0622) or send us emails ([service@evolutionmaintenance.com](mailto:service@evolutionmaintenance.com)) requesting service

**Verizon Wireless - Cushman & Wakefield Store #: 170827 City: Bristol State: VA Building Name: Bristol Week 3 Odd Cust. PO #: 2077707 Ticket #: 11510268**

**CL** Crystle Love/USA <Crystle.Love@cushwake.com>  
To: service@evolutionmaintenance.com Today at 11:01 AM

This message is high priority.

Can you help with this today or tomorrow?

**TICKET #:** 11510268  
**Account:** Verizon Wireless - Cushman & Wakefield  
5 Clear Creek Rd  
Bristol, VA, 24202

**BUILDING NAME:** Bristol Week 3 Odd


**PROBLEM DESCRIPTION TO VENDOR:**  
Exterior light out on the side of the building.

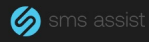
TECHNICIAN(S) MUST CHECK IN AND OUT USING THE STORES PHONE BY CALLING 888-540-9172 AND FOLLOWING THE PROMPTS. FAILURE TO COMPLY TO ALL OF CUSHMAN & WAKEFIELD FACILITIES SOLUTIONS REQUIREMENTS WILL RESULT IN NON-PAYMENT OF INVOICE. ONLY IN THE EVENT WHERE THERE ARE ISSUES RELATED TO THE IVR SYSTEM, CAN THE TECHNICIAN(S) BE CHECKED IN AND/OR OUT BY CALLING CUSHMAN & WAKEFIELD FACILITIES SOLUTIONS AT 316-721-3656. FACILITIES SOLUTIONS MUST HAVE A CURRENT W9 ON FILE TO ISSUE PAYMENT

Crystle Love  
Emergency Service Project Manager  
Facilities Solutions, GOS

Phone: +1 316 721 3656 x2164  
[crystle.love@cushwake.com](mailto:crystle.love@cushwake.com)

**CUSHMAN & WAKEFIELD**  
128 N. 1st St.  
Colwich, KS 67030 | USA  
[cushmanwakefield.com](http://cushmanwakefield.com)  
[LinkedIn](#) | [Facebook](#) | [Twitter](#) | [YouTube](#) | [Google+](#) | [Instagram](#)

		<b>Vendor Work Request Agreement</b>	
		Work Order #: <b>11509410</b>	
		Issued Date: May 07, 2021	
<b>Vendor:</b> Evolution Maintenance <b>Attn:</b> Angie Holland 1137 Myatt Boulevard  Nashville TN 37115		<b>Vendor Phone:</b> (615) 649-0622 <b>Vendor Fax:</b> (615) 866-3688	
<b>Store:</b> Verizon Wireless - Cushman & Wakefield 2608 E Stone Dr  Kingsport TN 37660 Phone: 423-245-4500 Building: Kingsport Week 3 Odd		<b>Store #:</b> 180789	
<b>Expected Completion</b>	<b>NTE Amount</b>	<b>C&amp;W Contact</b>	<b>C&amp;W Phone</b>
5/10/2021 11:48:10AM	\$300.00	Chris George	(316) 721-3656
<b>Description of Work:</b> Requesting to have 1 tube light replaced in the break room. The height is around 8 feet tall.			



WO #: 87069840  
Call Time: 5/7/2021 6:03 PM  
Response Window: 24 Hour Arrival  
Accept by: 5/10/2021 10:00 AM EST (if work order is not accepted or declined before the time shown above, it will automatically be withdrawn and dispatched to an alternative vendor.)  
Schedule by: N/A  
Arrive by: 5/10/2021 5:00 PM EST

**Location**

Signal Store #: 5002429  
200 Boulevard Rd, Carle - DSC1,  
CHATTANOOGA, TN 37421

**Problem Description**


Plumbing-Interior Lines/Fixture->Pipes Broken or Leaking (Major Plumbing)

**Additional Details:**  
Could have shrapnel and back up due to fire debris that may have entered floor drain in in-store repair area during fire clean up by fire dept and remediation team

**Troubleshooting**

- Please describe the issue in detail. When mens toilet is flushed toilet overflows along with floor drain, water is pushed out floor drain in in-store repair area damaged by fire and water lines to shop sink/steamer is backed out/overflowing.
- Are damaged pipes inside walls or under floor? Inside Walls
- Are the damaged pipes causing flooding inside the building? Yes
- If flooding, please confirm water is turned off? No
- Is water remediation needed? No

**Not To Exceed**



5/8/2021 8:42:06 AM MST Crestina Lemon

Please accept emergency WO

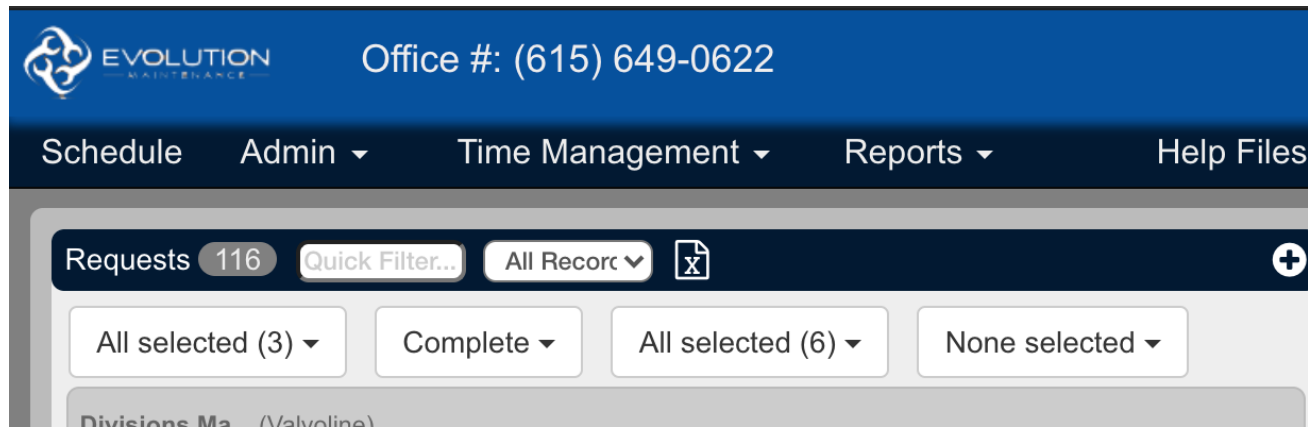
You can respond to this message by replying via email or you can view additional details in your [portal](#).

<b>Request Detail</b>		<b>Ref #:</b>	
WO#: 87060680			
NTE: \$325.00			
Status: Pending Vendor Acceptance		Work Order Type: Work Order	
Response Window: 4 h response			
Call Time: 5/8/2021 8:32:38 AM		Schedule Start:	
Schedule End:			
Service Category: Electrical		Service Type: Interior electrical	
Problem Code: Outlet not working			
<b>Location</b>			
Location #: PET2495		Region: Mid Atlantic	
Responsibility Entity:		Group: East	
District: Smoky Mountains			
Address: 203 Main Street, Oak Ridge, TN 37830			
<b>Key Questions</b>			
Please provide an alternate phone number:		8652940596	
Is there a Life/Safety issue related to this work order? (Fire, Safety, Flood)		Yes	
Does this work order need to be escalated?		Yes	

SMS ASSIST  
REVOLUTIONIZING MULTISITE PROPERTY MANAGEMENT  
Powered by © 2003-2017 SMS Assist.

# Workflow

- Carrie (and others) enters these tickets into EvoTrakker



Click the plus sign  
that appears to  
create a new  
ticket

# Workflow

### New Service Request

Call Center:

Direct Commercial

Company:

Best Buy

Location:

Best Buy #1130 (Nashville, TN)

Trade:

General Plumbing

Status:

Accepted

Pay Rate:

Regular (85)

Not To Exceed:

500

Guidance:

Plumbing issues such as general pipe leaks, leaks above the ceiling, etc.

Priority:

Same Day

Summary:

Best Buy #1130 - General Plumbin

Service Request #:

20210508-6025

Generate

Work Order #:

20210508-6025-1

Call Notes:

This is a test ticket

Office Notes:

Add a note...

Original Work Order:

Choose File

No file chosen

Customer Sign off doc:

Choose File

No file chosen

Create Service Request

Cancel

Team fills out ticket info and attaches Work Order Form

Each Call Center / Customer requires significant pre-call work to set up... rules, locations, etc.

Pre-call...



**EVOLUTION**  
— MAINTENANCE —

# Workflow Pre-Call

EVOLUTION

Office #: (615) 649-0622

ScheduleAdminTime ManagementReportsHelp Files

Company AdministrationDirect CommercialBest Buy

COMPANY DETAILTRADE DETAILSCONTACTSADDRESSESCOMPANY RULEBOOKLOCATIONS

General Info

Company Name:

Best Buy

Trip Charge %:

100

Billable Rule:

Round to nearest 15 min

Terms:

NET 30

Tax Exempt:

Not Exempt

Minimum Labor Charge (minutes):

60

Markup Percentage:

40

Active:

Active

Invoice Date (Show):

Do not Display

IVR Request Number:

False

Client Representative:

104

License Representative:

020

Invoice - Extra Text:

Materials Markup

From	To	Markup	
0	10	100	
10	20	90	
20	30	80	
30	40	70	
40	50	60	
50	60	50	
60	100	40	
100	250	35	
250	500	30	
500	1500	25	
1500	1000000	20	

Assigned Priorities

Priority	Company Specific	Arrival time (in hours)
Immediate	Immediate	1
Critical	Critical	4
Same Day	Same Day	8
First Call	Normal - First Call	12
Next Business Day	Normal - Next Business	24
2 Business Days	Normal - 2 Business D	48
Scheduled Next Week	Scheduled Next Week	168
Scheduled This Month	Scheduled This Month	720
Scheduled Next Month	Scheduled Next Month	1400



# Workflow Pre-Call

EVOLUTION  
MAINTENANCE

Office #: (615) 649-0622

ScheduleAdminTime ManagementReportsHelp Files


Company AdministrationDirect CommercialBest Buy

COMPANY DETAILTRADE DETAILSCONTACTSADDRESSESCOMPANY RULEBOOKLOCATIONS

Trade Details

Trade	Parent	Description	Description Override	NTE	NTE Override	Regular	Overtime	Holiday	Special	Scheduled After Hours	Regular Discount (RD)	(RD) Hour Limit	Helper	Flat Rate	Flat/Hourly	Trip Charge	Markup	Checklist
Electrical Repairs	Electrical	General category that covers all electrical based repairs		500	0	85	127.5	170	0	0	0	0	0	0	hourly	0	0	SC Check-in SC Service Guide SC Check-out
General Plumbing	Plumbing	Plumbing issues such as general pipe leaks, leaks above the ceiling, etc.		500	0	85	127.5	170	0	0	0	0	0	0	hourly	0	0	SC Check-in SC Service Guide SC Check-out

# Workflow Pre-Call

Office #: (615) 649-0622

ScheduleAdminTime ManagementReportsHelp Files

Company AdministrationDirect CommercialBest Buy

COMPANY DETAILTRADE DETAILSCONTACTSADDRESSESCOMPANY RULEBOOKLOCATIONS

Checklists

Select Checklist:

✓ SC Check-in


SC Check-out

SC Service Guide

☐Public for Quote☐Public for InvoicePre

Order	Question	Required	Answer Type	Answer Values
1	IVR via Mobile App - Launch SC GPS Check In Application. Enter IVR Pin #1289272. Select the work order option. You will be asked to provide the work order number - THIS WAS PROVIDED IN THE NOTES FOR THIS CALL AND IS SHOWN ABOVE!!! Follow onscreen instructions to change status. **This option should be utilized first on all work orders/tickets! Please call into the Evolution office (615-649-0622) if you're having issues BEFORE utilizing the phone option. Have you checked in via the App?	true	Drop Down	Yes, No
5	IVR via Store/Cell Phone - If you answered no above, you must call to check in. Please call 516-500-7776. Follow the prompts and enter in Pin# 1289272. You will be asked to provide the work order number - THIS WAS PROVIDED IN THE NOTES FOR THIS CALL AND IS SHOWN ABOVE!!! This option should be used last if unable to check in with the mobile app. Did you check-in via the phone?	true	Drop Down	Yes, No, NA
10	If neither the app nor the phone allows you to check-in, call the Evolution office (615-649-0622) ASAP!	false	Drop Down	Called Evolution office, Not Needed
15	Locate the Manager on Duty (MOD) and let them know you are there to assist with the issue specified in the call notes. You must provide them with the Big Sky number that was provided in the Service Request Detail section. Did you check-in with the manager?	true	Drop Down	Yes, No - they were not available, No - could not find the MOD
20	Remember - Source parts locally if possible for first call resolution. If going over NTE please call into the Evolution office (615-649-0622) for NTE increase.	false	Readonly	

# Workflow Pre-Call

<div>  <span>Office #: (615) 649-0622</span> </div>										
<div> <a href="#">Schedule</a> <a href="#">Admin</a> <a href="#">Time Management</a> <a href="#">Reports</a> <a href="#">Help Files</a> </div>										
<div> <div>Company Administration</div> <div> <div>Direct Commercial</div> <div>Best Buy</div> </div> </div>										
<div> <a href="#">COMPANY DETAIL</a> <a href="#">TRADE DETAILS</a> <a href="#">CONTACTS</a> <a href="#">ADDRESSES</a> <a href="#">COMPANY RULEBOOK</a> <a href="#">LOCATIONS</a> </div>										
<div> <div>Locations (22)</div> <div>Quick Filter...</div> </div>										
Location	Address 1	Address 2	City	State	Zip	Phone	Latitude	Longitude	Hours	Active
Best Buy #1064	401 S Mt Juliet Rd		Mount Juliet	TN	37122	615-754-9200				true
Best Buy #1070	5591 Hwy 153		Hixson	TN	37343	423-877-9929				true
Best Buy #1085	16680 Highlands Center Dr		Bristol	VA	24202	276-669-6163				true
Best Buy #1130	6810 Charlotte Pike		Nashville	TN	37209	615-353-1184				true
Best Buy #1382	11941 Parkside Dr		Farragut	TN	37934	865-218-9899				true
Best Buy #1399	5821 Poplar Ave		Memphis	TN	38119	901-537-7999				true
Best Buy #1425	2615 Medical Center Parkway		Murfreesboro	TN	37129	615-893-2493				true
Best Buy #1447	304 Market Plaza		Southaven	MS	38671	662-349-0551				true
Best Buy #165	2755 Germantown Pkwy		Memphis	TN	38134	901-373-8787				true
Best Buy #169	8925 Town & Country Circle		Knoxville	TN	37923	865-769-5358				true
Best Buy #170	1600 Galleria Blvd		Brentwood	TN	37027	615-376-0539				true
Best Buy #172	2311 Gallatin Pike N		Madison	TN	37115	615-859-0115				true
Best Buy #1894	2716 E Stone Dr		Kingsport	TN	37660	423-343-7639				true
Best Buy #2540	7600 Kingston Pike		Knoxville	TN	37919	865-691-8085				true
Best Buy #2780	1000 Rivergate PKWY Suite 1970		Goodlettsville	TN	37072	615-851-7057				true
Best Buy #488	2290 Gunbarrel Road Ste 168		Chattanooga	TN	37421	423-296-6353				true
Best Buy #663	2805 Wilma Rudolph Blvd		Clarksville	TN	37040	931-552-5239				true
Best Buy #853	1170 Vann Dr		Jackson	TN	38305	731-660-2829				true
Best Buy #899	3222 Peoples Street		Johnson City	TN	37604	423-262-0329				true
DELETE Best Buy #1070	5591 Hwy 153		Hixson	TN	37343	(123) 456-7890				true
DELETE Best Buy #169	8925 Towne And Country Cir		Knoxville	TN	37923	(865) 769-5358				true
DELETE Best Buy #170	1600 Galleria Blvd		Brentwood	TN	37027	(615) 376-0539				true

# Workflow

Tickets to be scheduled in orange... each Zone decides when to schedule and drags it onto the schedule.

The screenshot displays the EVOLUTION Maintenance software interface. The top navigation bar includes the company logo, office number, version, and user name. The main interface is divided into a sidebar on the left and a main schedule grid on the right. The sidebar contains a 'Requests' list with columns for 'All selected (3)', 'None selected', and 'None selected'. The main schedule grid shows a timeline for Monday, 10 May, with columns for each hour from 00:00 to 23:00. The grid is populated with various tickets, many of which are highlighted in orange. A red arrow points from the text 'Tickets to be scheduled in orange...' to the 'Requests' list. Another red arrow points from the text 'All tickets for the day on each tech' to the 'Schedule' grid.

All tickets for the day on each tech

# Workflow

If needed, the office can add additional notes, photos, etc. to the ticket



EVOLUTION  
MAINTENANCE

Office #: (615) 649-0622

3.4.23 Daniel Stone

ScheduleAdminTime ManagementReportsHelp Files

Requests1000Quick FilterAll RecordsSchedule

All selected (3)None selectedNone selected

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

4021 Asp..., Franklin177988468

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

230 Fran..., Franklin177988453

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

900 Rosa..., Nashville177988428

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

211 Fran..., Brentwood177988433

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

2312 12L..., Nashville177988432

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

1892 Eas..., Nashville177988427

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

1892 Eas..., Nashville177988403

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

2312 12L..., Nashville177988401

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

4021 Asp..., Franklin177988313

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

230 Fran..., Franklin177988298

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

900 Rosa..., Nashville177988296

Direct Comme... (Jen's Splendid Ice Creams)

05/05/21Scheduled This Month - Unassigned

05/05/21Scheduled This Month - Unassigned

Service Request # 177531872

Call Center: Direct Commercial

Company: Chipotle

Location: Chipotle #2802

4829 N Broadway St, Knoxville, TN, 37918

865-688-5438

View Map

Details

Created: 04/28/21

Status: Assigned

Trade: Walk-In Cooler

Priority: Critical

Invoice#: null

Total Due: \$2,500.00

Date Due: null

NTE: \$2,500.00

IVR Request #: null

Zone: 2 - Legacy

Guidance: Reactionary repair on a Walk-In Mid-Temp Cooler

Primary WO: 177531872-1

Quoted Time Start: mm/dd/yyyy, --:-- --

Service Request #: 177531872

Cust Sign Off: Open Signoff Doc

INTERIOR / REFRIGERATION - EQUIPMENT / WALK-IN COOLER / NOT COOLING / Not going down

Call note: Spoke to MOD, Karri, she said it's been temping at 47 since she came in at 4 pm. MOD didn't know if it was temping earlier today. Door has been closed, fans are running, no ice build up or leaks. MOD didn't know if boxes were blocking air flow, she said they got a large truck yesterday. No ice build up or leaks.

Office note:

NotesSystem: [checked]

Public	Date	User	Action
<input type="checkbox"/>	05/07/21 4:17 PM	Brian Nuckols	
22 May 07 2021 17:17 EST			
Created By Eric Greschner Evolution Maintenance Inc			
Tech is scheduled to return on Monday, May 10th to check for leaks since dye has had time to run through the system.			
Scheduled			
May 10 2021 07:00 EST			

Work Order Detail 177531872-1 - Assigned

Description: Chipotle #2802 - Walk-In Cooler

Technician: Adam Branch

Status: Assigned (Scheduled)

Start Date: 05/10/21 6:00 AM

End Date: 05/10/21 8:00 AM

NTE: \$2,500.00

Edit

Create Work Order

Create QC Visit

Create DC Visit

Send Email

Mark Invoiced

Reject

Checklists

SC Check-in

SC Service Guide

SC Check-out

Service Items - Incurred

Name	Price	Qty	Unit	Tax	Markup	Total	Action
Asset - Walk-In Cooler - Walk-in cooler condensing unit							
Dye uv	60.5	1	EA	\$6.05	\$26.62	\$93.17	<div> Purchased  Select Receipt</div>
Description: PHNCLSU5							
R404A Refrigerant	15	2	EA	\$3.00	\$0.00	\$33.00	<div>   Truck</div>
Description: R404A Refrigerant							
\$126.17							

Prepare Quote

Time Worked Hourly

Name	Date	Pay Rate	Amt	Days:Hrs:Min	
Rene Santos	04/29/21	Overtime (127.5)	127.5	\$90.76	0:00:42 12:20 - 1:02
Adam Branch	04/28/21	Overtime (127.5)	127.5	\$159.43	0:01:15 8:44 - 9:59
\$250.20					

Trip Charge 100 X 127.5 = \$127.50

Invoice: \$177.70

# Workflow – Tech View

Evotrakker.com  
Evotech2025!



Office #: (615) 649-0622

3.4.28

## Login

Username:

abbranch

Password:

.....



➡ Login



# Workflow – Tech View

Schedule - Show Work Hours (7am to 7pm)

	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Adam Branch							Direct Commercial - Chipotle - Walk-In			SMS Assist - Tuesday Morning -		SMS Assist - Tuesday Morning - HVAC			Direct Commercial - Love's Travel Center									

Tech view of the same schedule

EVOLUTION MAINTENANCE

Clock In Worked 00:00:00 Break 00:00:00 Office #: (615) 649-0622 3.4.28

Schedule - Show Full Day (12am to 12pm)

10 May 2021

	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00
Adam Branch	Direct Commercial		SMS Assist - Tuesday Morning		SMS Assist - Tuesday Morning			Direct Commercial - Love's Travel Center				

**Map** Satellite

KENTUCKY

Cherokee National Forest

Winston-Salem

Chattanooga

Map data ©2021 Google Terms of Use Report a map error

**A** Cr-1544, Scottsville, KY 42164, USA

173 mi. About 3 hours 13 mins

1. Head northwest on Cr-1544 toward State Hwy 98 0.3 mi
2. Turn right onto State Hwy 98 1.4 mi
3. Slight right 1.3 mi
4. Merge onto State Hwy 98 9.4 mi
5. Turn left onto KY-100 E 15.3 mi
6. Turn right onto State Hwy 87/Clements Rd 1.9 mi

Continue to follow Clements Rd  
Entering Tennessee

**Chipotle**  
Walk-In Cooler  
Scheduled [Enroute](#)

**Tuesday Morning**  
HVAC Repair  
Scheduled [Enroute](#)

**Tuesday Morning**  
HVAC Repair  
Scheduled [Enroute](#)

**Love's Travel Center**  
Breaker/Circuit [Enroute](#)

# Workflow – Tech View

When ready to start the day... Clock in.  
Same place take a break and clock out

The screenshot displays the EVOLUTION MAINTENANCE Tech View interface. At the top, there is a blue header bar with the company logo on the left. To the right of the logo are three buttons: "Clock In" (highlighted with a red arrow), "Worked 00:00:00", and "Break 00:00:00". Below the header is a dark blue bar with the text "Schedule - Show Full Day (12am to 12pm)". Underneath this is a row of three buttons: "Day", "Week", and "Timeline" (which is selected). To the right of these buttons is a large number "10". Below the buttons is a table with columns for time slots: 07:00, 08:00, 09:00, 10:00, and 11:00. The first row of the table is labeled "Adam Branch". The 07:00 slot contains a yellow box with the text "Direct Commercial". The 09:00 slot contains a yellow box with the text "SMS Assist - Tuesday Morning". The 11:00 slot contains a yellow box with the text "SMS Assist - Tuesday Morning". At the bottom of the interface is a map showing a street view.

	07:00	08:00	09:00	10:00	11:00
Adam Branch	Direct Commercial		SMS Assist - Tuesday Morning		SMS Assist - Tuesday Morning



# Workflow – Tech View

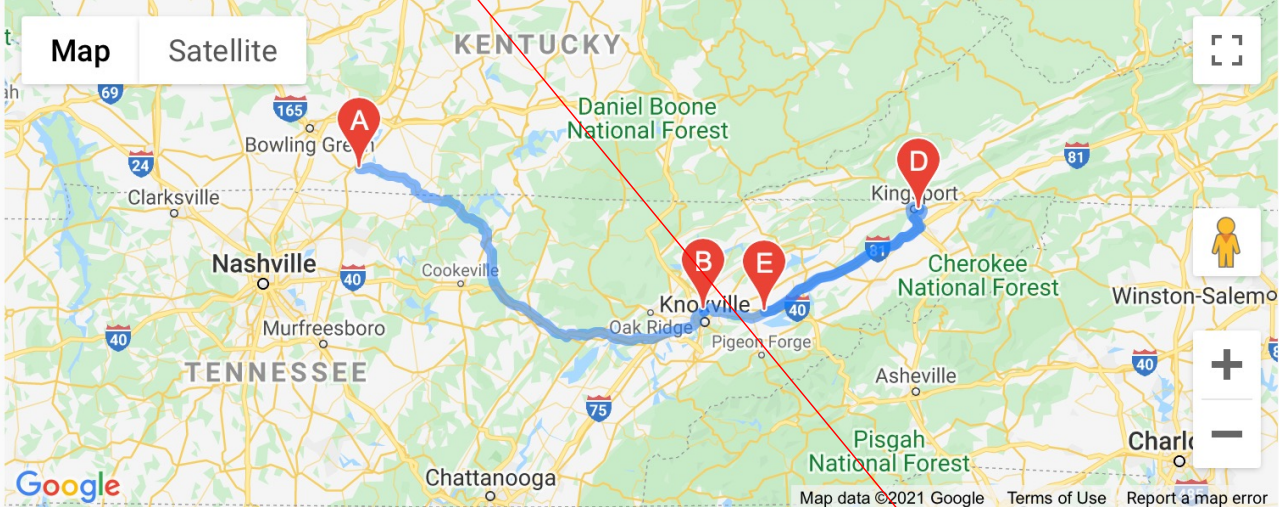
Look at the overview of your day. The click enroute to your first job

Schedule - Show Full Day (12am to 12pm)

Day Week Timeline 10 May 2021 Today ◀ ▶

	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00
Adam Branch	Direct Commercial		SMS Assist - Tuesday Morning		SMS Assist - Tuesday Morning			Direct Commercial - Love's Travel Center				

Map Satellite



Map data ©2021 Google Terms of Use Report a map error

**Chipotle**  
Walk-In Cooler Scheduled [Enroute](#)

**Tuesday Morning**  
HVAC Repair Scheduled [Enroute](#)

**Tuesday Morning**  
HVAC Repair Scheduled [Enroute](#)

**Love's Travel Center**  
Breaker/Circuit [Enroute](#)

When onsite, open the appropriate ticket by simply clicking on it

# Workflow – Tech View

The selected ticket is a darker blue – once onsite click, “Check in” to check into the job for EvoTrakker (other checkins may be required)

**EVOLUTION MAINTENANCE** Clock In Worked 00:00:00 Break 00:00:00 Office #: (615) 649-0622 3.4.28

Schedule - Show Full Day (12am to 12pm)

Work Orders for 5/10/2021

177531872 (Walk-In Cooler)	B7012371 (HVAC Repair)	B7012361 (HVAC Repair)	178199816 (Breaker/Circuit)
6:00 - 8:00 <a href="#">Check In</a>	9:00 - 11:00 <a href="#">Check In</a>	11:15 - 1:15 <a href="#">Check In</a>	2:00 - 4:00 <a href="#">Check In</a>

**SERVICE REQUEST DETAIL** CHECKLISTS NOTES / ATTACHMENTS SERVICE ITEMS LOCATION ASSETS LOCATION HISTORY

**Direct Commercial - Chipotle**  
Chipotle #2802  
4829 N Broadway St  
Knoxville, TN, 37918  
865-688-5438

Work Order **177531872-1** Tech Assigned **Adam Branch** Status **Scheduled**

NTE	Spent	Remaining
2500	540.545	1959.45

**Service Request #:** 177531872  
**Trade:** Walk-In Cooler  
**IVR Number:** 177531872  
**Guidance:**  
**Call Note:** INTERIOR / REFRIGERATION - EQUIPMENT / WALK-IN COOLER / NOT COOLING / Not going down

**Message:** Please be aware this ticket has an NTE of \$2500. If you are going to go over this amount, please call the office ASAP!!!

Spoke to MOD, Karri, she said it's been temping at 47 since she came in at 4 pm. MOD didn't know if it was temping earlier today. Door has been closed, fans are running, no ice build up or leaks. MOD didn't know if boxes were blocking air flow, she said they got a large truck yesterday. No ice build up or leaks.

Why are you here?

What is your Not To Exceed?



**EVOLUTION**  
— MAINTENANCE —

# Not To Exceed

- If we go over this amount without calling and getting pre-approval, we usually do not get paid for it. We lose. You will be less profitable and will impact your quarterly profit bonus. Period.
- This costs Evolution over \$100K a year... money that would go into all of our pockets as profit.
- That should piss you off!
- ALWAYS CALL FOR A NTE INCREASE!!!


# Workflow – Tech View

Click through to the next tab – Checklists – YOU MUST GO THROUGH THESE STEPS!!! Each customer has their own requirements, this is how we communicate them to you and get what they require to pay us (remember, WHY)


The screenshot displays the Evolution Maintenance Tech View interface. At the top, there's a header with the Evolution logo, a 'Clock In' button, 'Worked 00:00:00', 'Break 00:00:00', 'Office #: (615) 649-0622', and version '3.4.28'. Below the header, a sidebar on the left contains icons for home, info, calendar, and settings. The main content area shows a 'Schedule - Show Full Day (12am to 12pm)' section with 'Work Orders for 5/10/2021'. A table lists four work orders: 177531872 (Walk-In Cooler) from 6:00 - 8:00, B7012371 (HVAC Repair) from 9:00 - 11:00, B7012361 (HVAC Repair) from 11:15 - 1:15, and 178199816 (Breaker/Circuit) from 2:00 - 4:00. Each entry has a 'Check In' button. A red arrow points from the instruction text above to the 'Check In' button for the 9:00 - 11:00 slot. Below the work orders, there are tabs for 'SERVICE REQUEST DETAIL', 'CHECKLISTS' (which is highlighted), 'NOTES / ATTACHMENTS', 'SERVICE ITEMS', 'LOCATION ASSETS', and 'LOCATION HISTORY'. The 'CHECKLISTS' tab shows a 'SC Check-in' section with a 'Question' and an 'Answer' dropdown. The questions and their corresponding answers are: 1. 'IVR via Mobile App - Launch SC GPS Check In Application. Enter IVR Pin #1289272. Select the work order option. You will be asked to provide the work order number - THIS WAS PROVIDED IN THE NOTES FOR THIS CALL AND IS SHOWN ABOVE!!! Follow onscreen instructions to change status. \*\*This option should be utilized first on all work orders/tickets! Please call into the Evolution office (615-649-0622) if you're having issues BEFORE utilizing the phone option. Have you checked in via the App?' with answer 'Yes'. 2. 'IVR via Store/Cell Phone - If you answered no above, you must call to check in. Please call 516-500-7776. Follow the prompts and enter in Pin# 1289272. You will be asked to provide the work order number - THIS WAS PROVIDED IN THE NOTES FOR THIS CALL AND IS SHOWN ABOVE!!! This option should be used last if unable to check in with the mobile app. Did you check-in via the phone?' with answer 'NA'. 3. 'If neither the app nor the phone allows you to check-in, call the Evolution office (615-649-0622) ASAP!' with answer 'Not Needed'. 4. 'Locate the Manager on Duty (MOD) and let them know you are there to assist with the issue specified in the call notes. Did you check-in with the manager?' with answer 'Yes'. At the bottom, there's a 'Remember - Source parts locally if possible for first call resolution. If going over NTE please call into the Evolution office (615-649-0622) for NTE increase.' section. The footer shows the 'SC Service Guide' and the Evolution Maintenance logo.





EVOLUTION MAINTENANCE

# Workflow – Tech View

 EVOLUTION  
MAINTENANCE





Clock In Worked 00:00:00 Break 00:00:00

Office #: (615) 649-0622 3.4.28 



Schedule - Show Full Day (12am to 12pm)

Work Orders for 5/10/2021





<b>177531872 (Walk-In Cooler)</b> 6:00 - 8:00 	B7012371 (HVAC Repair) 9:00 - 11:00 	B7012361 (HVAC Repair) 11:15 - 1:15 	178199816 (Breaker/Circuit) 2:00 - 4:00 
--	--	--	--


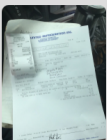

SERVICE REQUEST DETAILCHECKLISTSNOTES / ATTACHMENTS (highlighted)SERVICE ITEMSLOCATION ASSETSLOCATION HISTORY

Notes

Date	User	Action
05/07/21 4:17 PM	Brian Nuckols	
22 May 07 2021 17:17 EST		
Created By Eric Greschner Evolution Maintenance Inc		
Tech is scheduled to return on Monday, May 10th to check for leaks since dye has had time to run through the system.		
Scheduled		
May 10 2021 07:00 EST		
kbrightman@chipotle.com; ; service@evolutionmaintenance.com		
-----		
05/07/21 4:15 PM	System Generated	
Work Order (177531872-1) edit by Brian Nuckols (Form) time changed from		
5/10/2021 6:00:00 AM -- 5/10/2021 8:00:00 AM to		
5/10/2021 5:00:00 AM -- 5/10/2021 7:00:00 AM		
-----		
05/07/21 4:13 PM	System Generated	
Work Order (177531872-1) edit by Brian Nuckols (Form) time changed from		
4/29/2021 5:00:00 PM -- 4/29/2021 7:00:00 PM to		
5/10/2021 6:00:00 AM -- 5/10/2021 8:00:00 AM		
-----		
05/07/21 4:13 PM	System Generated	


Attachments



Description	Attachment	Receipt
Installed dye to system		<input type="checkbox"/>
Part receipt		\$60.50 <input checked="" type="checkbox"/>
After box temp		<input type="checkbox"/>

On this tab is where you can add additional notes, photos, upload receipts related to this specific job, PDF documents and capture signatures


# Workflow – Tech View





 EVOLUTION MAINTENANCE

Clock In

Worked 00:00:00


Break 00:00:00


Office #: (615) 649-06223.4.28





Schedule - Show Full Day (12am to 12pm)

Work Orders for 5/10/2021

177531872 (Walk-In Cooler)  
6:00 - 8:00 

B7012371 (HVAC Repair)  
9:00 - 11:00 

B7012361 (HVAC Repair)  
11:15 - 1:15 

178199816 (Breaker/Circuit)  
2:00 - 4:00 

SERVICE REQUEST DETAIL


CHECKLISTS


NOTES / ATTACHMENTS

SERVICE ITEMS

LOCATION ASSETS


LOCATION HISTORY

Service Items - Incurred

Name	Price	Qty	Unit	Tax	Markup	Total	Action
Asset - Walk-In Cooler - Walk-in cooler condensing unit							
Dye uv	60.5	1	EA	\$6.05	\$26.62	\$93.17	<div>Purchased</div> <div>Select Receipt</div> <div>Delete</div>
Description: P#NCLSUV5							
R404A Refrigerant	15	2	EA	\$3.00	\$0.00	\$33.00	<div>Truck</div> <div>Delete</div>
Description: R404A Refrigerant							
<div> Prepare Quote</div>						Subtotal:	\$126.17

Add ANY item you use in an effort to address the customer's issue

# Workflow – Tech View



Clock In

Worked 00:00:00

Break 00:00:00

Office #: (615) 649-0622

3.4.28






Schedule - Show Full Day (12am to 12pm)

Work Orders for 5/10/2021

<b>177531872 (Walk-In Cooler)</b> 6:00 - 8:00	B7012371 (HVAC Repair) 9:00 - 11:00	B7012361 (HVAC Repair) 11:15 - 1:15	178199816 (Breaker/Circuit) 2:00 - 4:00
--	--	--	--

SERVICE REQUEST DETAILCHECKLISTSNOTES / ATTACHMENTSSERVICE ITEMSLOCATION ASSETSLOCATION HISTORY

Assets



Trade: Food Equipment Category: Grill & Griddle Manufacturer: Woodstone Model #: WS-PL-4836-4-CT00NG Serial #: GP1B14DEC1502656 Description: Flat top Grill	
Trade: Refrigeration Category: Prep Table Manufacturer: Not Listed Model #: MARK7CH000A14 Serial #: 151150002965 Description: Cold rail	
Trade: Refrigeration Category: Walk-In Cooler Model #: DFE46-100-DE Serial #: E15L00735888005003 Description: Walk-in cooler evaporator	
Trade: Refrigeration Category: Walk-In Cooler Manufacturer: Norlake Model #: NEASD150RCC3-#BQ Serial #: 16011262 Description: Walk-in cooler condensing unit	
Trade: Plumbing	

Capture information on all relevant assets





# Workflow – Tech View


Clock In
Worked 00:00:00
Break 00:00:00
Office #: (615) 649-0622
3.4.28


Schedule - Show Full Day (12am to 12pm)

Work Orders for 5/10/2021

177531872 (Walk-In Cooler)  
6:00 - 8:00
➔ Check In

B7012371 (HVAC Repair)  
9:00 - 11:00
➔ Check In

B7012361 (HVAC Repair)  
11:15 - 1:15
➔ Check In

178199816 (Breaker/Circuit)  
2:00 - 4:00
➔ Check In

SERVICE REQUEST DETAIL
CHECKLISTS
NOTES / ATTACHMENTS
SERVICE ITEMS
LOCATION ASSETS
LOCATION HISTORY

Service Request History at this Location

Trade	Date	Summary of Work Performed
Walk-In Cooler	04/29/21	Arrived onsite. MOD state said that they were working fine yesterday when she was here and didn't know they were down. Found three sets of hot wells, 1 on front line, 1 on side, and 1 in front of grill. We turned all three sets on. All three sets came on and heating properly. At the time of departure/arrival all heat wells were working and verified by MoD Elizabeth.
Food Prep Table	04/22/21	04/15 Arrived onsite. Found women's restroom sink. Employees had turned water off from line valve. Reset tripped gfi outlet. Water line runs from valve to electric sink system to censored sink faucet. Replaced batteries and unit is still not working. Need to replace faucet. Quoting model faucet suggested by Chipotle contact. 04/29 Returned to site. Replaced faucet in women's restroom. Tested and returned to service. Sink is working properly upon departure.
General Plumbing	04/14/21	Arrived onsite. Inspected water heater, found pop valve leaking a steady stream of water. Removed old and installed new pop valve. Verified it was not leaking. Put water heater back into service. Verified burners turn on when water was turned on and water was heating correctly. Temperature was set to 140.
Water Heater	03/10/21	02/15 Arrived onsite. Located grill. Inspected and found working as should. Manager advised gas line popping loose at quick connect. Called Karl and he advised to replace out quick connect. Will return to install. 03/09 Arrived onsite. Replaced quick connect on gas line for grill. Verified grill lite back up properly before departure.
Grill	02/15/21	Arrived onsite and checked in with mod. Manager's issue has been resolved.
General Plumbing	02/08/21	Arrived onsite. Located walk in cooler. Inspected and found unit frozen up. Thawed with heat gun. Proceeded to roof and inspected unit. Found unit low charge. Added R404 refrigerant per specs, clearing sight glass. Inspected and found no visible signs of leak. If problem reoccurs, recommend performing leak check. Allowed unit to cycle on and off for 3 complete cycles by thermostat . Unit is working properly upon departure.
Walk-In Cooler	11/22/20	Woodstone Flat top grill Model #: WS-PL-4836-4-CT00NG Serial #: GP1B14DEC1502656 08/06 Arrived on site. MOD stated the grill would not light and tried resetting it, but it would not light. Located the grill. Found gas ball valve was turned off. MOD stated they had turned it off when it would not light. Turned gas and grill on. The grill did light and started heating. Removed front cover and everything looked normal. Turned grill off and on several times and it lit every time. Grill is working normal on departure. 08/07 Arrived on site and found grill not working. Tried to light grill but could not see any sparkina from the ignitor. Pulled ignitor out.

History of services at this location








**EVOLUTION**  
— MAINTENANCE —



# Workflow – Tech View

- When you have finished, or need to return for more labor, parts or quote to finish, click “Check out”
- You cannot check out as complete until all required checklist items have been provided

- Back in the office view world, we read your notes, transfer them over for the customer to see (tell them why), check for photos, signatures, forms filled out (showing them why)

<p>Steven Willard</p> <p>Added: 05/07/21 4:28 PM</p>	
<p>After</p> <p>Added: 05/07/21 4:24 PM</p>	
<p>Data tag</p> <p>Added: 05/07/21 4:23 PM</p>	
<p>Supply sensor</p> <p>Added: 05/07/21 4:22 PM</p>	
<p>Before</p> <p>Added: 05/07/21 4:22 PM</p>	



# Workflow

- Once we have resolved the customer's issue and have all of the needed info, we create the invoice in EvoTrakker



INVOICE # 38130

Evolution Maintenance, Inc  
1137 Myatt Blvd.  
Madison, TN 37115  
Phone: (615) 649-0622  
Email: service@evolutionmaintenance.com

DATE DUE: 07-04-2021  
TOTAL DUE: \$2,334.34  
TRACKING#: WO-54177  
EH / CR / LR: 103 / 104 / 020

**BILL TO:**  
Big Lots  
4900 East Dublin Granville Road  
Columbus, OH 43081

**SERVICE TO:**  
Big Lots #1845  
4109 Lebanon Pike  
Hermitage, TN 37076

## SERVICE ITEMS INCURRED

SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	UNIT	RATE	AMOUNT
04/05		Arrived on site and spoke with the MOD. Inspected backflow device and found unit will need a rebuild kit to complete repairs.				
04/21		Arrived on site. Installed backflow repair kit and backflow is still leaking from the relief valve. Backflow will need to be replaced.				
05/03		Arrived on site. Installed new backflow in existing location. Tested backflow. Passed. Report is being sent to Big Lots corporate.				
4/5/2021	Incurred Labor	Dave Williams	1		\$85.00	\$85.00
4/21/2021	Incurred Labor	Dave Williams	1.75		\$85.00	\$148.75
5/3/2021	Service Item	FEBCO 860/860U/880-CK1 905352 1-1/4 to 2 check assy	1.00	1.00	\$52.45	\$52.45
5/3/2021	Service Item	FEBCO 850/850U/860/860U/880-CH2 905351 1-1/4 to 2 check assy	1.00	1.00	\$52.45	\$52.45
5/3/2021	Service Item	FEBCO 905422 11/2 Repl Cap	1.00	1.00	\$480.42	\$480.42
5/3/2021	Trip Charge	Trip Charge	1		\$85.00	\$85.00

## SERVICE ITEMS FOR QUOTED WORK

SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	UNIT	RATE	AMOUNT
		Quote to return to site and replace backflow - test (paperwork will be turned into the water provider for this city).				
5/3/2021	Incurred Labor	Dave Williams	2		\$85.00	\$170.00
4/6/2021	Service Item	Backflow Test	1.00	EA	\$181.50	\$181.50
4/21/2021	Service Item	Wilkins Zurn 975XL	1.00	EA	\$762.81	\$762.81
4/21/2021	Service Item	1 1/2 propress male adapter	2.00	EA	\$46.87	\$93.74
4/21/2021	Service Item	1 1/2 propress coupling	2.00	EA	\$28.61	\$57.22
4/22/2021	Service Item	Propress - Equipment Fee	1.00	EA	\$165.00	\$165.00

TOTAL: \$2,334.34



**EVOLUTION**  
— MAINTENANCE —

# Workflow

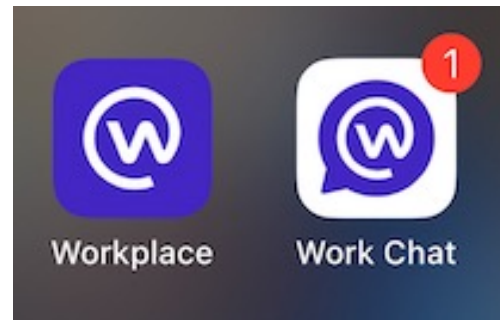
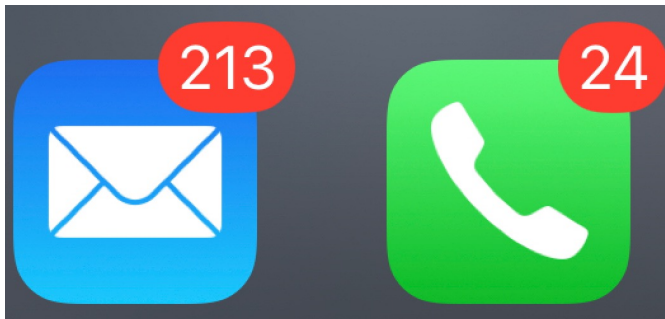
- We may have to email, upload in portals, fill out tons of additional information to finish the invoicing process and to tell the customer – why.



# Communication Tools

# There are a lot... and I mean a lot of communication tools you need to learn!

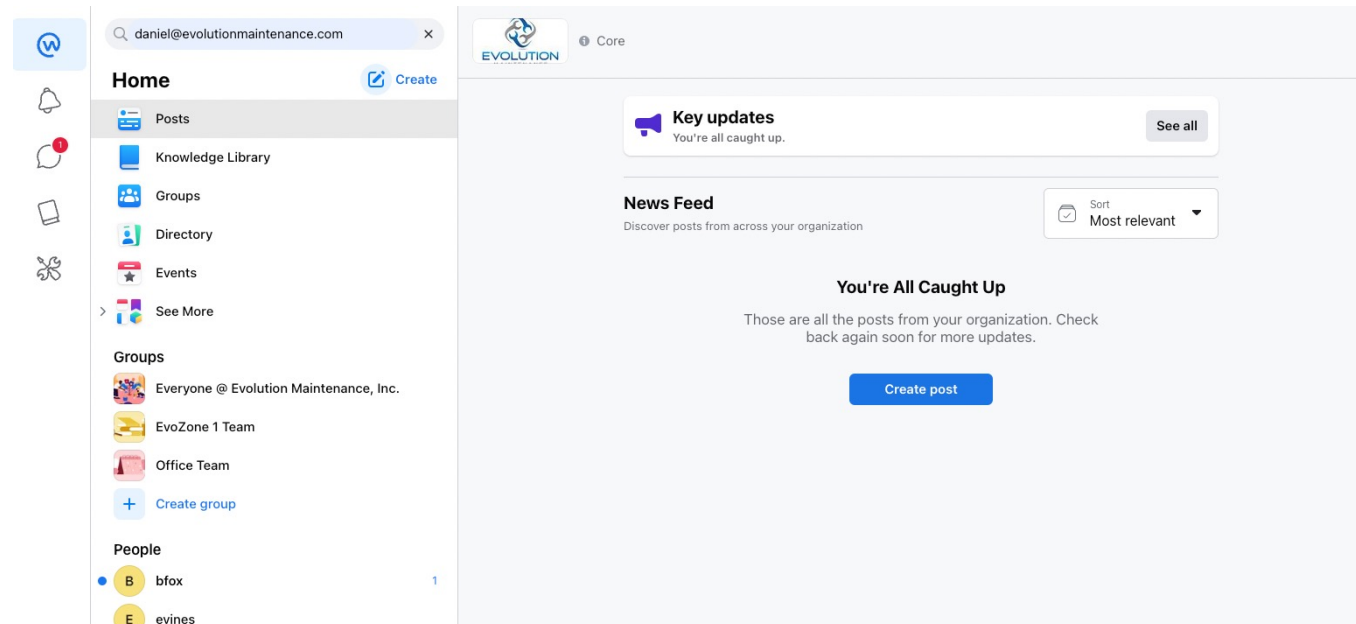
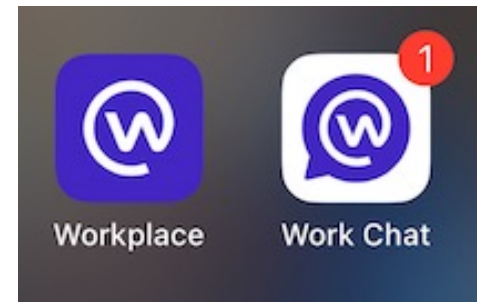
- Absolutely the most important – [www.evotrakker.com](http://www.evotrakker.com)
  - Your time
  - Where you need to be
  - What other apps/phone numbers etc. that need to be used on specific tickets
  - Photos, notes, where you write quotes
  - Receipts
- **Email** – your first initial, last name @evolutionmaintenance.com or @evohomeservices.com – we use email daily and you need to check it at least that much!
- **Phone/text** – whether your personal or company provided phone... please answer it!
- **Workplace** – new app to allow more dynamic and more frequent communication in a 360° manner





# Workplace

- Unlike EvoTrakker (that is a website), Workplace is an app...
  - This has been added to all of your iPads
- KEEP IT PROFESSIONAL but, if we post it is someone's birthday, wish them a happy one; if we have good news, share it, we can have human elements to this corporate tool... BUT KEEP IT PROFESSIONAL!!!
- Periodically will choose a few techs to cover specific points to better educate
  - Short videos can be uploaded
- HR Documents
- Training Documents



## NEW EMPLOYEE ONBOARDING

EDIT LEARNING PATH

ASSIGN



## Description

Training sessions for new Evolution Maintenance team members

## Details

5 Courses

1 External Link

## Assignments Overview

0

OVERDUE

1

IN PROGRESS

0

COMPLETED

## Content



+ ADD CONTENT

Add a course from the catalog or your own external URL using the add content button on the right. To edit or remove a content item, click the three-dot menu button on the right side of that item. To change the order of the content, click and hold the reorder icon on the left side of the item you want to move, then drag and drop to the desired position.



Personal Protective Equipment (PPE) • Course • Beginner



Distracted Driving • Course • Beginner



Aggressive Driving • Course • Beginner



Ladder Safety • Course • Beginner



Sexual Harassment Prevention in the Workplace • Course • Beginner



Familiarize yourself with the Workplace portal - more Evolution policies, safety, etc. for you to read at any time

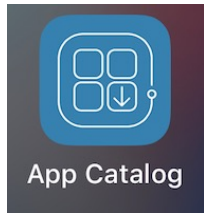
• External Link

• <https://evolutionmaintenanceinc417.workplace.com/work/knowledge/488606096566775> •

20



# Apps...



Used to update apps... with MDM, we use this and NOT the app store.

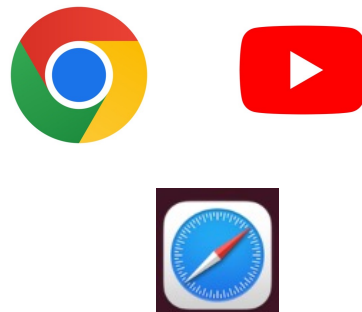
Need something – call Daniel (615-469-0268)

## Conducting Business Apps...

Filling out customer  
required PDF forms...



Browsers, things to use  
to search the internet



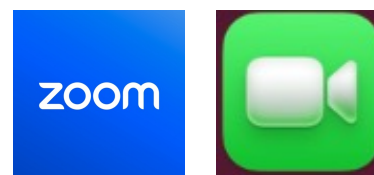
Paycheck/W2



Vehicle maintenance?



Need Long Distance Face-to-face?



## Customer Apps...



## Supplier Apps...



# Spending Company Money

# When Spending Company Money

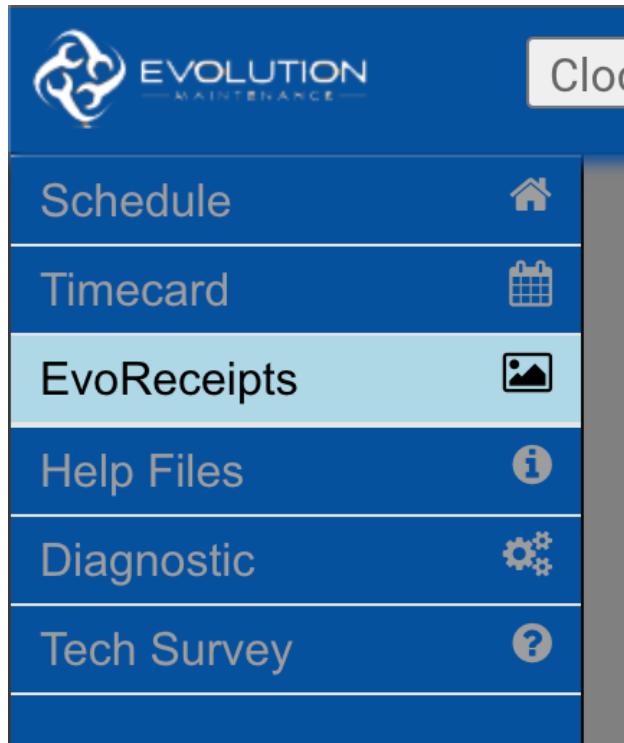
- It is very simple.
- If you are about to spend over \$200 call Eric (if he is not available) Daniel to get approval. Period. Submit your receipt immediately.
- If it is under \$200, use company provided card. ***Submit your receipt immediately.***
- If it is fuel – use WEX card
- If it is vehicle maintenance related (upcoming)



# How to Submit Receipts

- Walk to your vehicle, or in the store at the counter
- Take a CLEAR and COMPLETE picture of the receipt!
- Go into EvoTrakker via your iPad or smart device (<https://evotrakker.com/default.html#/evoreceipts>) and walk through the process (next slides)
- Keep the physical receipt in your possession for a minimum of 3 months for returns or if questions arise when billing or processing

# EvoReceipts



Add a short description of what the receipt is (could be the WO#, the name of the vendor, just something short – we will get specific as we go).

A screenshot of the 'EvoReceipts' 'Add Receipt' form. It has a dark blue header with the title 'EvoReceipts'. Below the header, the text 'Add Receipt' is displayed. A label 'Short Description of Receipt:' is followed by a text input field containing the text 'TN Ace Hardware'. A red asterisk is visible to the right of the input field.

Then enter the amount. In this example, it was \$55

A screenshot of the 'Amount' field in the EvoReceipts form. The label 'Amount:' is followed by a numeric input field containing the value '55.00'. A red asterisk is visible to the right of the input field.

Select the type of expense (if more than one, choose the option that covers the majority of the expenses on the receipt):

A screenshot of the 'Type' dropdown menu in the EvoReceipts form. The label 'Type:' is followed by a dropdown menu. The menu is open, showing a list of options: 'Cost of Good sold', 'Truck Stock', 'Vehicle Related', 'Lodging/Meals', 'Small Tools', 'Fuel', and 'Other'. The first option, 'Cost of Good sold', is selected and highlighted with a blue checkmark.

# EvoReceipts

Depending on what you choose, you may see different options. For this example, we are choosing “Cost of Good sold” and thus we would need to associate this to any work orders that are assigned to you. Next you will choose the supplier at which you purchased these items. As you can see in the list, we have pre-populated hundreds of potential locations. However, if you do not see it in the drop down, click on the “not in list” and add the name of the supplier.

EvoReceipts

Add Receipt

Short Description of Receipt: TN Ace Hardware

Amount: \$5.00

Type: Cost of Good sold

Supplier:

Service Requests:

- 1000Bulbs.com
- 84 Lumber
- A&A Glass and Frames
- ABC Plumbing Supply & Hardware
- Ace Hardware
- Acme Inc.
- Action Dock Services, Inc.
- Action Rentals & Sales
- Advance Auto Parts
- Aggies Print & Copy
- Alamo Construction Supply
- Alarm Liquidators
- Alarms 24/7
- All Rite Plumbing Parts
- All-Interior Supply
- Allied Electric Motor Company, Inc.
- Amazing Machinery
- Amazon
- American Leak Detection
- American Pipe & Supply Co Inc.
- Apex Beverage Equipment
- Aqua Pure Solution's
- Aramisco
- Art Pancake's Rent-All
- Atech Inc.
- B&G Distributing Inc.
- Baker Distributing
- BAR Environmental Supply, INC
- Batteries Plus Bulbs
- Best Buy
- Best Supply
- Bluff City Electronics
- Boiler Supply Co. Inc.
- Bolivar Hardware
- BR Supply Inc.
- Build.com
- Builders Supply Monteagle, LLC
- Bulbs.com
- Cabinet Maker Warehouse
- Cannon Marketing, Inc.
- Capitol City Bolt & Screw Co., Inc.
- Carquest
- Carrier Enterprise
- Carrier Enterprise, LLC (CE)
- CCSE Service Group

Supplier:



\* ☐ not in list?



**EVOLUTION**  
— MAINTENANCE —

# EvoReceipts

Now, associate the receipt to a Service Request (work order). You will see a list of all service requests on which you are assigned.

Service Requests:

- ✓
- 20201103-853 - Pilot Travel Center #11 - General Plumbing
- 20201228-5434 - Pilot Travel Center #1049 - HVAC Repair
- 20210531-2987 - Archwood Meadows #1632a - Additional Circuit
- 20210909-113 - Logan's Roadhouse #302 - General Plumbing
- 20220115-9361 - Taco Bell - HVAC Repair
- 20220502-5489 - Pilot Travel Center #412 - Interior Lighting

When you select the desired Service Request, you will now be able to check the specific service items that this receipt covers. Below is an example of the full EvoReceipts screen at this point:

**EvoReceipts**

**Add Receipt**

Short Description of Receipt:

Amount:

Type:

Supplier:

Service Requests:

Comment:

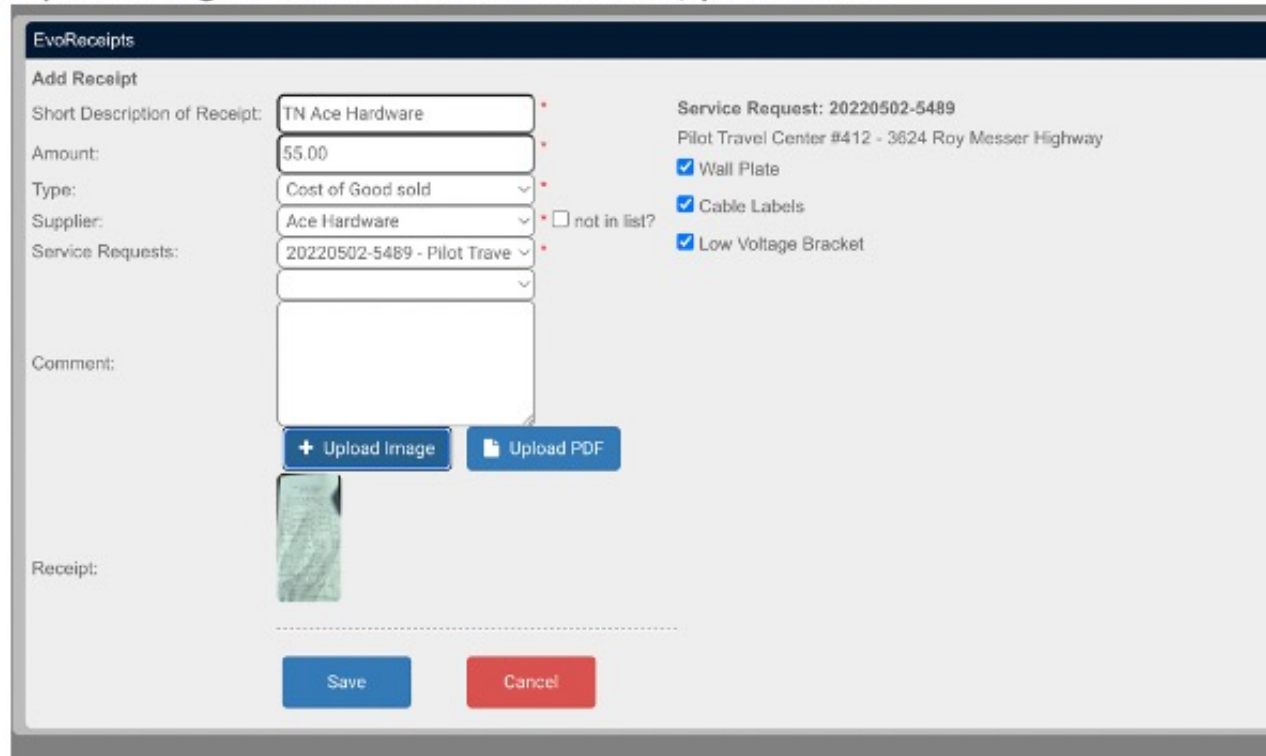
Receipt:

Service Request: 20220502-5489  
Pilot Travel Center #412 - 3624 Roy Messer Highway

- ☒ Wall Plate
- ☒ Cable Labels
- ☒ Low Voltage Bracket

# EvoReceipts

Notice, below the selected Service Request a new drop down has appeared. If this receipt covers multiple service requests, you can choose as many as needed. Once you are done with this step, you can then add any additional comments and then choose the photo of the receipt you just took by clicking on "Upload Image". Once it has been selected, you will see:



The screenshot shows the 'EvoReceipts' form interface. It includes fields for 'Short Description of Receipt' (TN Ace Hardware), 'Amount' (55.00), 'Type' (Cost of Good sold), 'Supplier' (Ace Hardware), and 'Service Requests' (20220502-5489 - Pilot Trave). There are also checkboxes for 'Wall Plate', 'Cable Labels', and 'Low Voltage Bracket'. A 'Comment' field is present. Below the form are 'Upload Image' and 'Upload PDF' buttons. A receipt image is shown in the 'Receipt:' section. At the bottom are 'Save' and 'Cancel' buttons.

**EvoReceipts**

**Add Receipt**

Short Description of Receipt: TN Ace Hardware \*

Amount: 55.00 \*

Type: Cost of Good sold \*

Supplier: Ace Hardware \*

Service Requests: 20220502-5489 - Pilot Trave \*

Service Request: 20220502-5489  
Pilot Travel Center #412 - 3624 Roy Messer Highway

☒ Wall Plate

☒ Cable Labels

☒ Low Voltage Bracket

☐ not in list?

Comment:

+ Upload Image

Upload PDF

Receipt:

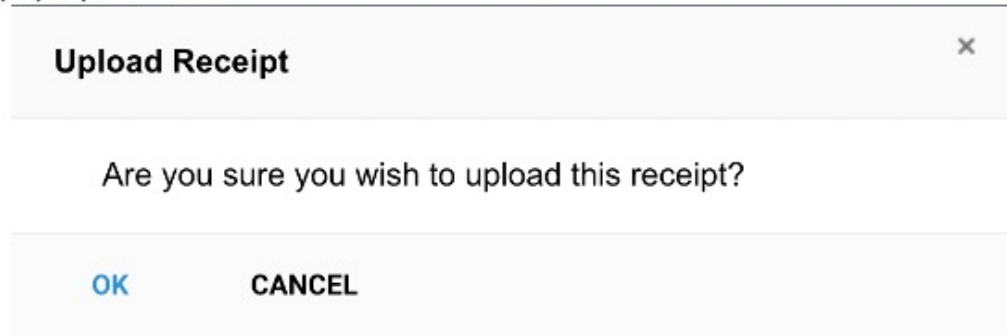
Save

Cancel

Click on "Save"

# EvoReceipts

You will see a pop-up – click “OK”




At the bottom right-hand side of the screen, you will see a quick message pop-up saying that the Receipt has been saved.

That's it. Nothing else is needed from you regarding this receipt. Keep it for 90 days in case you need to return anything but that is it.

Behind the scenes, we will see this info in a Receipts report:

Date	Type	Amount	Call Center	Company	Supplier	Supplier Entered	Service Request	Tech	Submitted By	Attachment
05/02/2022	Cost of Good sold	\$55.00	Direct Commercial	Pilot Travel Center	Ace Hardware		20220502-5489	Eddie Brooks	Eddie Brooks	

And your email will also be automatically sent to [receipts@evomain.com](mailto:receipts@evomain.com). Below is another example of an email that was sent:

 **Inbox > Message Detail**

**Subject:** Tennessee Hardware - \$55 - Other - Daniel Stone

**From:** [noreply@evolutionmaintenance.com](mailto:noreply@evolutionmaintenance.com) (Add as Preferred Sender)

**Date:** Mon, May 02, 2022 6:38 pm

**To:** [Receipts@evomain.com](mailto:Receipts@evomain.com)

Comment: Items for new office build out - and this is a test of the email system


Supplier: Tennessee Hardware

Amount: \$55

Receipt Type: Other

Submitted by: Daniel Stone

Download

✓ Attachments	Size	Action(s)
<input type="checkbox"/>  <a href="#">EvoReceipt.Tennessee Hardware.55.Other.LT-S-Daniel Stone.jpg</a>	286 k	<a href="#">Download</a>



**EVOLUTION**  
— MAINTENANCE —

# What happens if you don't send in receipts?

Naughty list...

receipts@evolutionmaintenance.com			
01.09 MISSING SPARKS RECEIPTS			
To: Brandon Leftwich, Daniel Stone, Devin Bass, Dwight Garner,			
DATE	DESCRIPTION	SPENT	CARD
1/7/2023	Ford Electric	\$218.09	Brandon L
1/4/2023	Hobbs & Associates, Inc.	\$158.42	Brandon L
1/4/2023	THERMODYNE FOOD SERVIC	\$130.02	Brandon L
1/4/2023	Lowe's	\$16.11	Brandon L
12/21/2022	Lowe's	\$70.77	Brandon L
12/21/2022	Lowe's	\$64.44	Brandon L
12/21/2022	Lowe's	\$118.87	Brandon L
12/21/2022	Lowe's	\$54.43	Brandon L
12/21/2022	Lowe's	\$18.50	Brandon L
12/21/2022	Lowe's	\$458.14	Brandon L
12/21/2022	Lowe's	\$6.33	Brandon L
1/6/2023	Times Free Press	\$1,468.00	Daniel
1/5/2023	Ace Hardware	\$1.17	Devin
1/7/2023	Home Depot	\$63.03	Dwight
1/6/2023	Sales and Rentals	\$394.63	Dwight
1/6/2023	Morristown Rural King	\$52.61	Eddie
1/4/2023	HAMBLÉN MORRISTOWN SOL	\$21.32	Eddie
11/25/2022	Hamblen Morristown Sol	\$6.95	Eddie
12/16/2022	Amazon	\$4.49	Eric
12/19/2022	Habitat For Humanity	\$13.72	Galen
1/7/2023	Sherwin Williams	\$3.62	Jeremy
12/30/2022	FERGUSON ENT #147	\$11.10	Jerome
11/22/2022	FERGUSON ENT, INC 56	\$5.11	Jerome
1/7/2023	Lowe's	\$105.23	Jesse
1/5/2023	Ed Supply	\$47.28	Jonathan L
12/28/2022	COOL SPRINGS CAR WASH	\$5.00	Jonathan L
12/12/2022	Ed Supply	\$8.87	Jonathan L
12/22/2022	Lowe's	\$3.91	Junior
1/5/2023	Ed Supply	\$75.71	Kevin
12/30/2022	Ed Supply	\$87.81	Kevin
12/17/2022	Ed Supply	\$21.91	Kevin
12/17/2022	PARKING - PARKING	\$12.29	Kevin
12/14/2022	Lennox Industries Inc.	\$1,479.64	Kevin
12/8/2022	METRO VALET PARKING SE	\$5.00	Kevin
11/25/2022	Lennox Industries Inc.	\$504.43	Kevin T
1/4/2023	Lowe's	\$32.90	Lane
12/6/2022	Lowe's	\$15.96	Lane
12/3/2022	Home Depot	\$22.54	Lane
12/2/2022	Lowe's	\$1.00	Melissa
1/7/2023	Lowe's	\$87.78	Mike
12/22/2022	CARE SUPPLY CO	\$795.34	Quentin
12/21/2022	METROPOLIS	\$25.20	Quentin

- Customer not billed correctly (COGS underestimated – we will show you later why this is bad)
- IRS audits us and calls us dirty liars
- At some point, we will assume you bought it for your own use and remove that amount from your check (to be FAIR we typically ask for the receipts multiple, multiple times before we do this... usually the receipts magically appear then...)



**EVOLUTION**  
— MAINTENANCE —



# Fuel

- Use the VEHICLE SPECIFIC fuel card (should be in the vehicle)

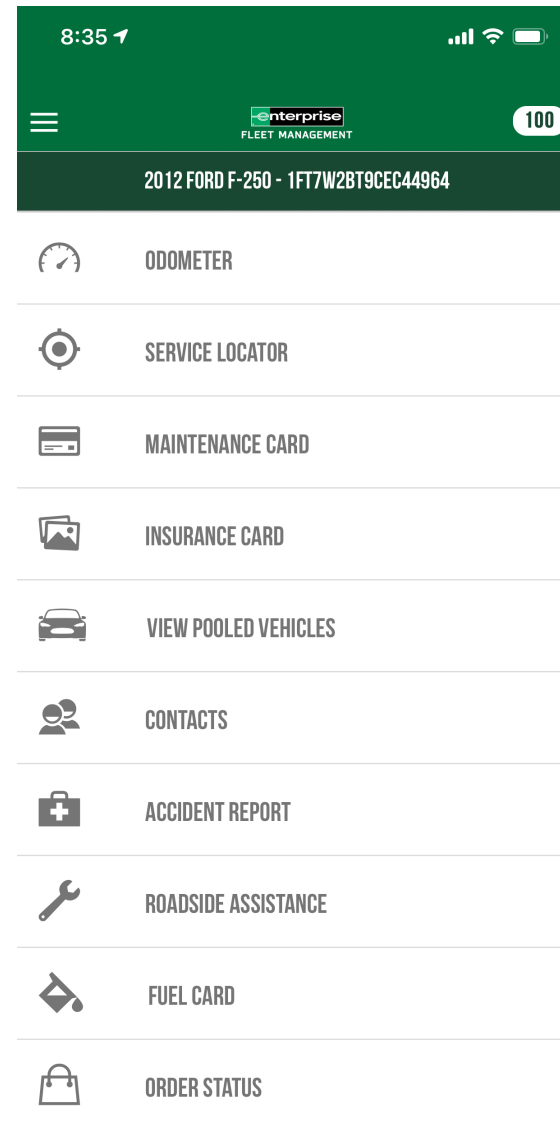


- If you hop into another company vehicle and it needs fuel, use the fuel card in that vehicle
- It will ask for the odometer reading
- It will ask for a pin – that was assigned to you and is specific to you

# Fleet - Maintaining Company Vehicles

- eFleets app
  - Stuck in a ditch, need a tow? Use the app to find a service close to you... if you need help, call your dispatcher/person on call.
  - Need an oil change... Use the app to find a service close to you.
  - Need a repair... Use the app to find a service close to you.
- 
- If services are going to impact your time, always keep your zone team in the loop so schedules can be modified!
- 
- CHANGE THE DAMN OIL!!!

# Fleet - Maintaining Company Vehicles





# Maintaining Company Vehicles

**verizon connect** **Reveal**

Live Map Scheduler Reports Replay Video Places Alerts Dashboard Fleet Service

Help DS

View: Drivers

Select All Drivers

- ☒ Ashmore, Wilson (2017 Ford Trans
- ☒ Brewster, Johnnie (2017 Ford Tran
- ☒ Brooks, Eddie (2008 Ford F450)
- ☒ Cole, Chad (2014 Chevrolet Expre
- ☒ Cunningham, Jeff (2016 Ford Trans
- ☒ Cusick, Galen (2017 Ford F150 1FT
- ☒ Daskam Donovan, Susanna (0997
- ☒ Dial, Micheal (2018 Ford Transit 25
- ☒ Garcia, Junior Vigil Garcia (JUNIO
- ☒ Kerrent, Brandon (2017 Ford Trans
- ☒ Kirk, Jesse (2001 Ford F-150 1FTR
- ☒ Miller, Mike (2015 Ford F350 Super
- ☒ Nixon, Chris (CHRIS)
- ☒ Osbourne, Leon (2015 Ford Transi
- ☒ Pantaleon, Erano (2019 Chevy Exp
- ☒ Reich, Kevin (2017 Ford Transit 1F
- ☒ Rhea, Steven (2012 Ford F-250 1F
- ☒ Romeo, John (2018 Ford F250)
- ☒ Santos, Rene (5834)
- ☒ Scarborough, David (2017 Ford Tr

DESELECT ALL

Fit To Map

MAP SATELLITE

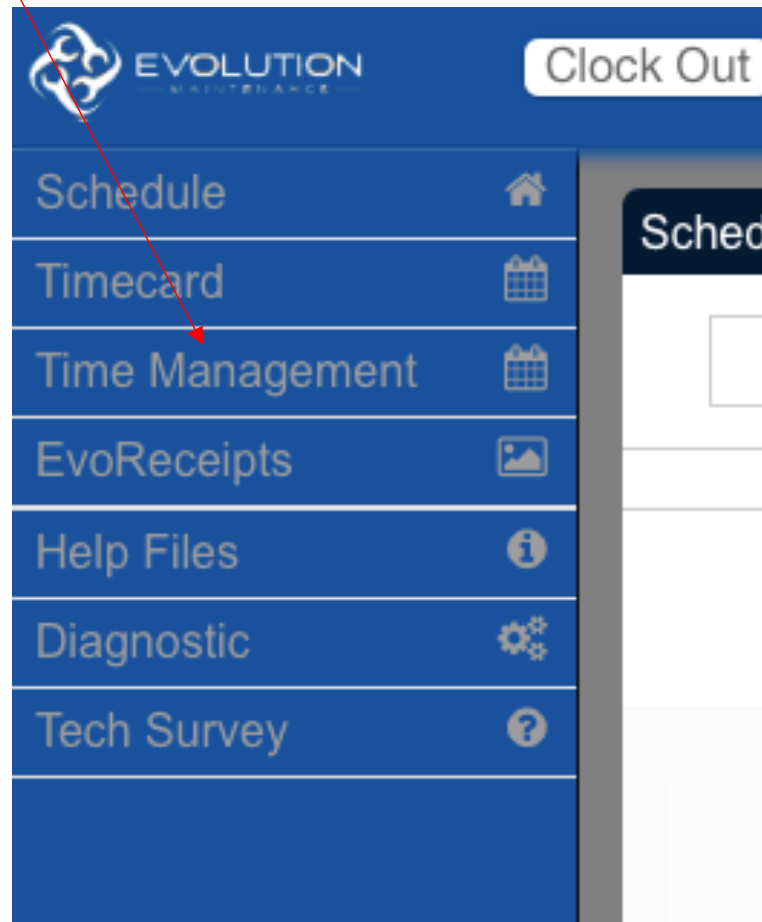
FEEDBACK



# Requesting Time Off

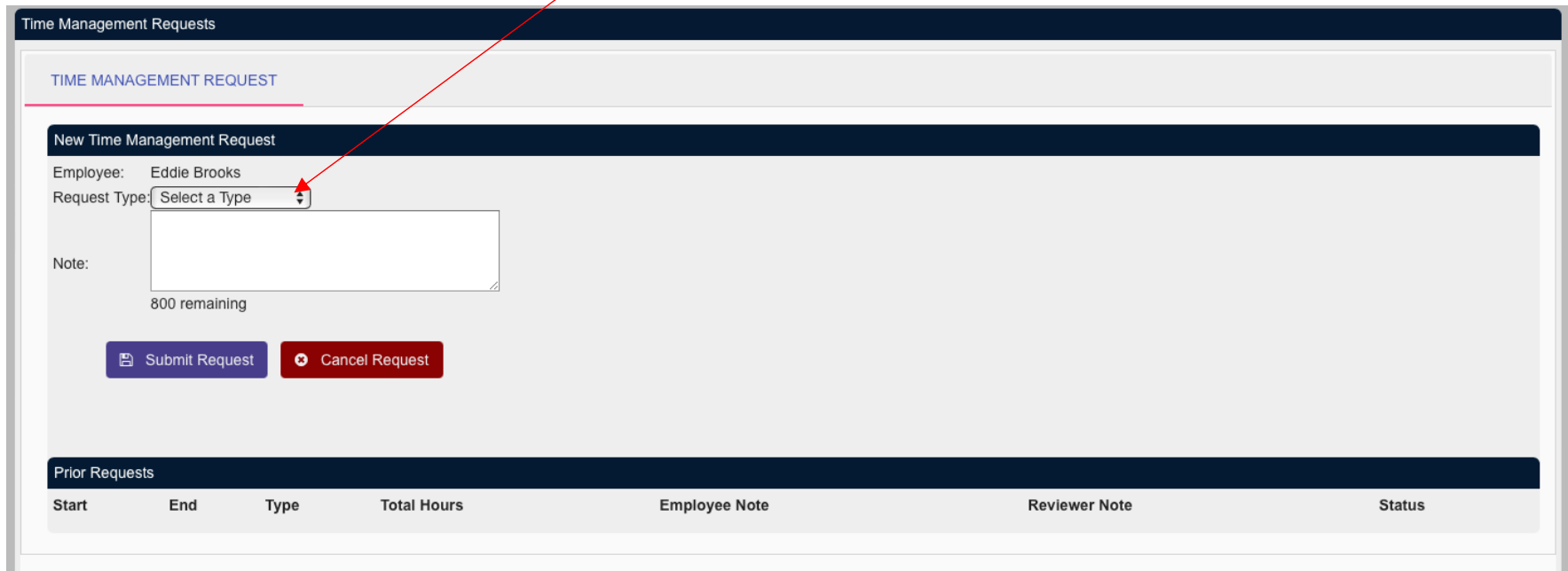
# To Request Time off...

- This is all done through EvoTrakker
- On the navigation portion of EvoTrakker (upper left-hand corner), you will see “Time Management” – click on it.

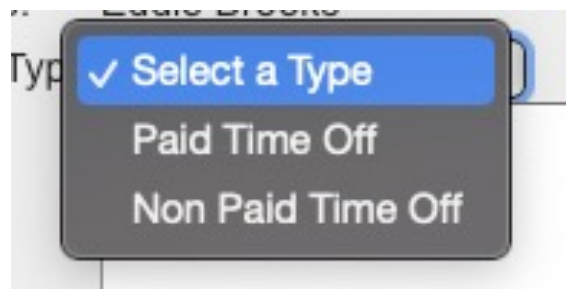


# To Request Time off...

- This will load the Time Management Request form
- Choose the Request Type:



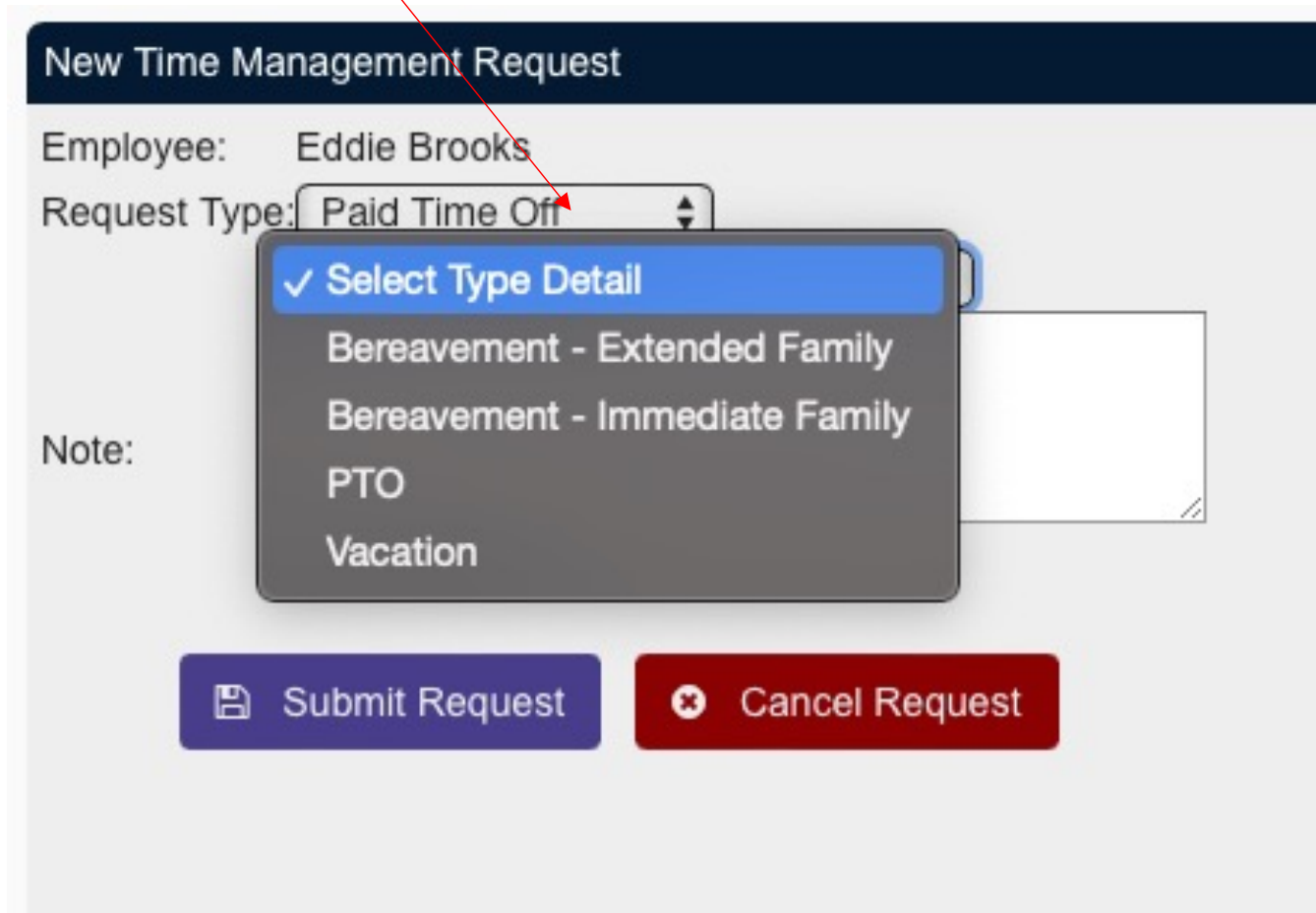
The screenshot shows a web interface for 'Time Management Requests'. At the top, there's a header 'Time Management Requests'. Below it, a section titled 'TIME MANAGEMENT REQUEST' contains a 'New Time Management Request' form. The form has fields for 'Employee' (Eddie Brooks), 'Request Type' (a dropdown menu with 'Select a Type' selected), and a 'Note' text area. Below the note area, it says '800 remaining'. There are two buttons: 'Submit Request' and 'Cancel Request'. At the bottom, there's a table titled 'Prior Requests' with columns: Start, End, Type, Total Hours, Employee Note, Reviewer Note, and Status.





# To Request Time off...

- Paid Time off options:



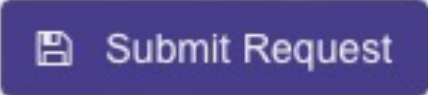
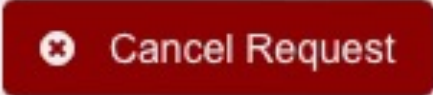
**New Time Management Request**

Employee: Eddie Brooks

Request Type: Paid Time Off

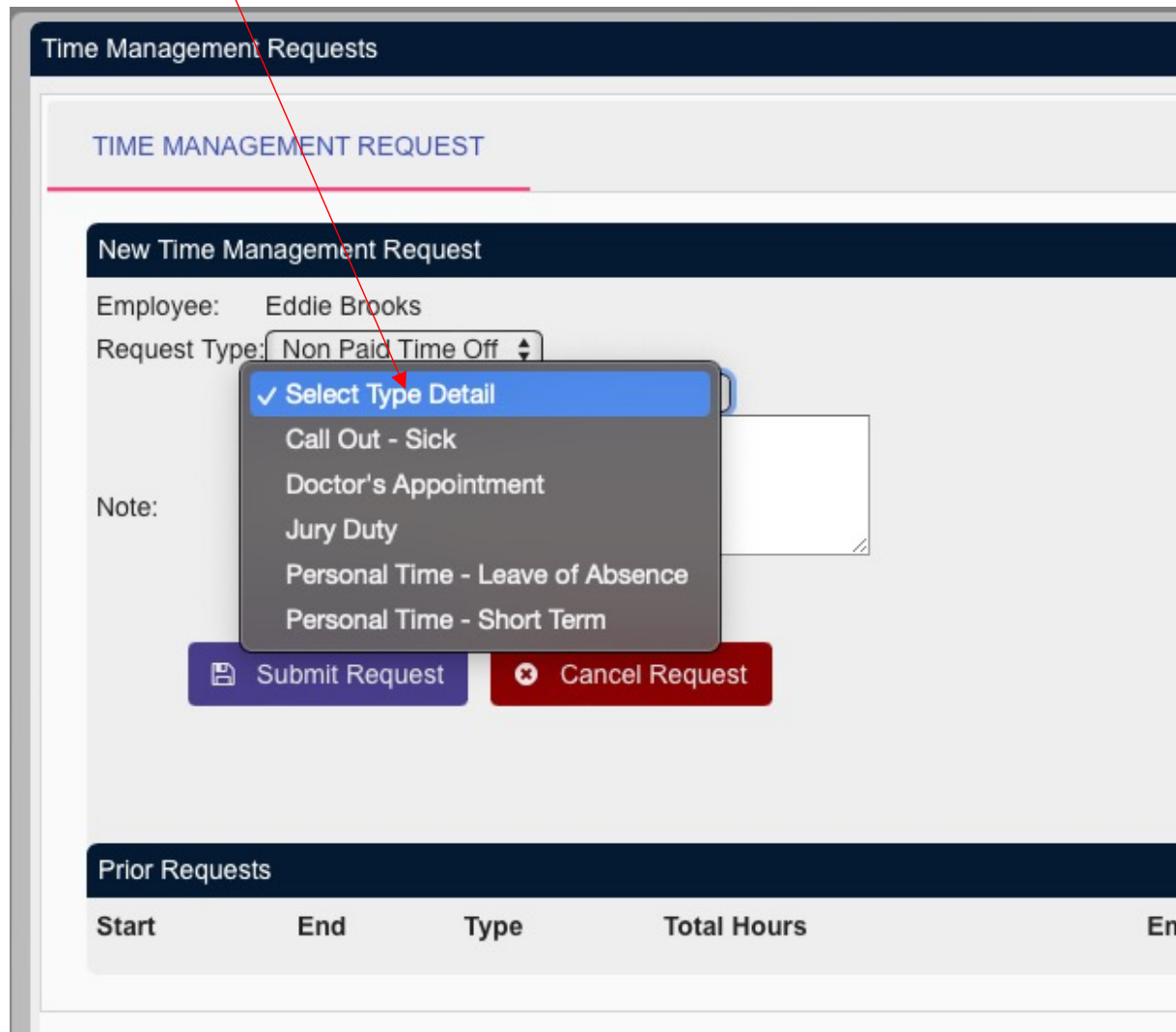
Note:

- ✓ Select Type Detail
- Bereavement - Extended Family
- Bereavement - Immediate Family
- PTO
- Vacation

 Submit Request  Cancel Request

# To Request Time off...

- Non-Paid Time off options:

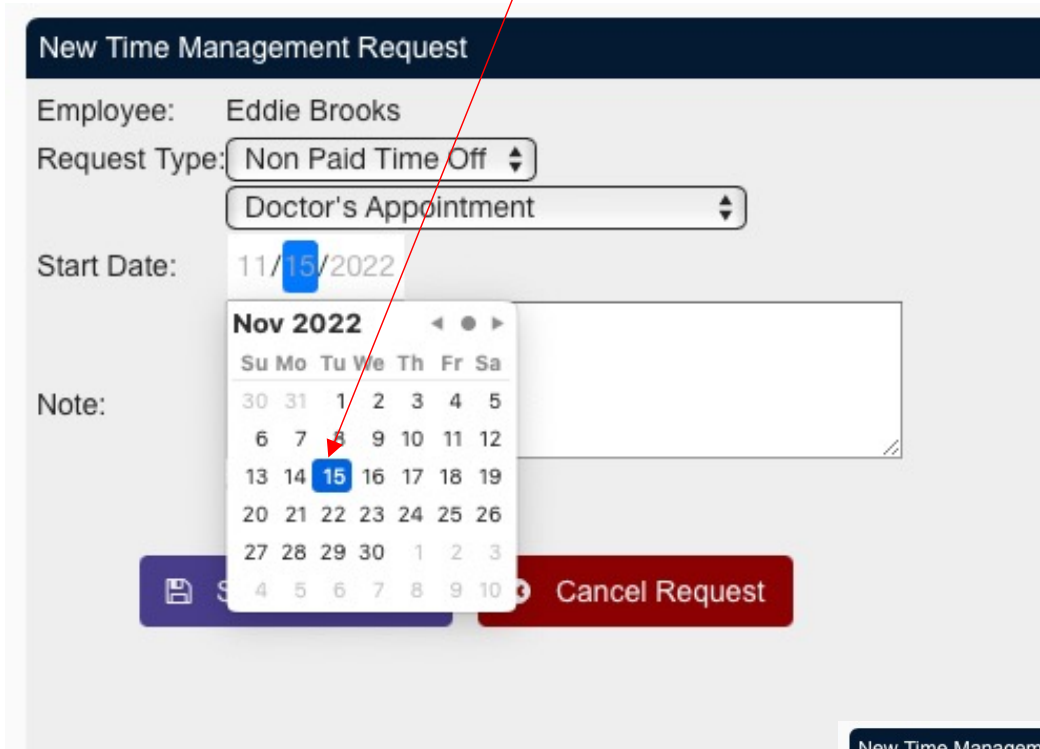


The screenshot displays the 'Time Management Requests' interface. At the top, a dark blue header bar contains the text 'Time Management Requests'. Below this, a light gray section is titled 'TIME MANAGEMENT REQUEST'. The main form area is titled 'New Time Management Request'. It includes fields for 'Employee:' (Eddie Brooks) and 'Request Type:' (Non Paid Time Off). A dropdown menu is open for the 'Request Type' field, showing several options: 'Select Type Detail' (highlighted with a blue bar and a checkmark), 'Call Out - Sick', 'Doctor's Appointment', 'Jury Duty', 'Personal Time - Leave of Absence', and 'Personal Time - Short Term'. A red arrow points from the bullet point in the text above to the 'Non Paid Time Off' option in the dropdown. Below the dropdown is a 'Note:' field. At the bottom of the form are two buttons: 'Submit Request' (purple) and 'Cancel Request' (red). Below the form is a section titled 'Prior Requests' which contains a table with columns: 'Start', 'End', 'Type', 'Total Hours', and 'Em'.

Start	End	Type	Total Hours	Em
-------	-----	------	-------------	----

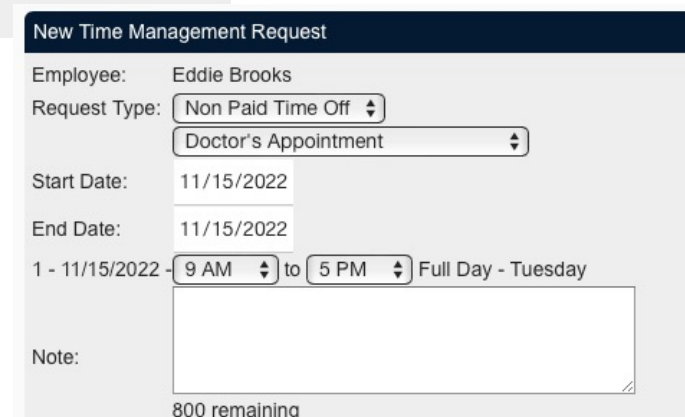
# To Request Time off...

- Once you select the appropriate type (and sub type) choose the date(s) you are requesting



The screenshot shows the 'New Time Management Request' form. The 'Employee' field is 'Eddie Brooks'. The 'Request Type' is 'Non Paid Time Off' and the sub-type is 'Doctor's Appointment'. The 'Start Date' is '11/15/2022'. A calendar for November 2022 is open, showing the date '15' selected. A red arrow points from the text 'choose the date(s) you are requesting' to the date '15' on the calendar. The 'Note' field is empty. At the bottom, there are buttons for 'Save' and 'Cancel Request'.

- And you can specify time
- Default is all day

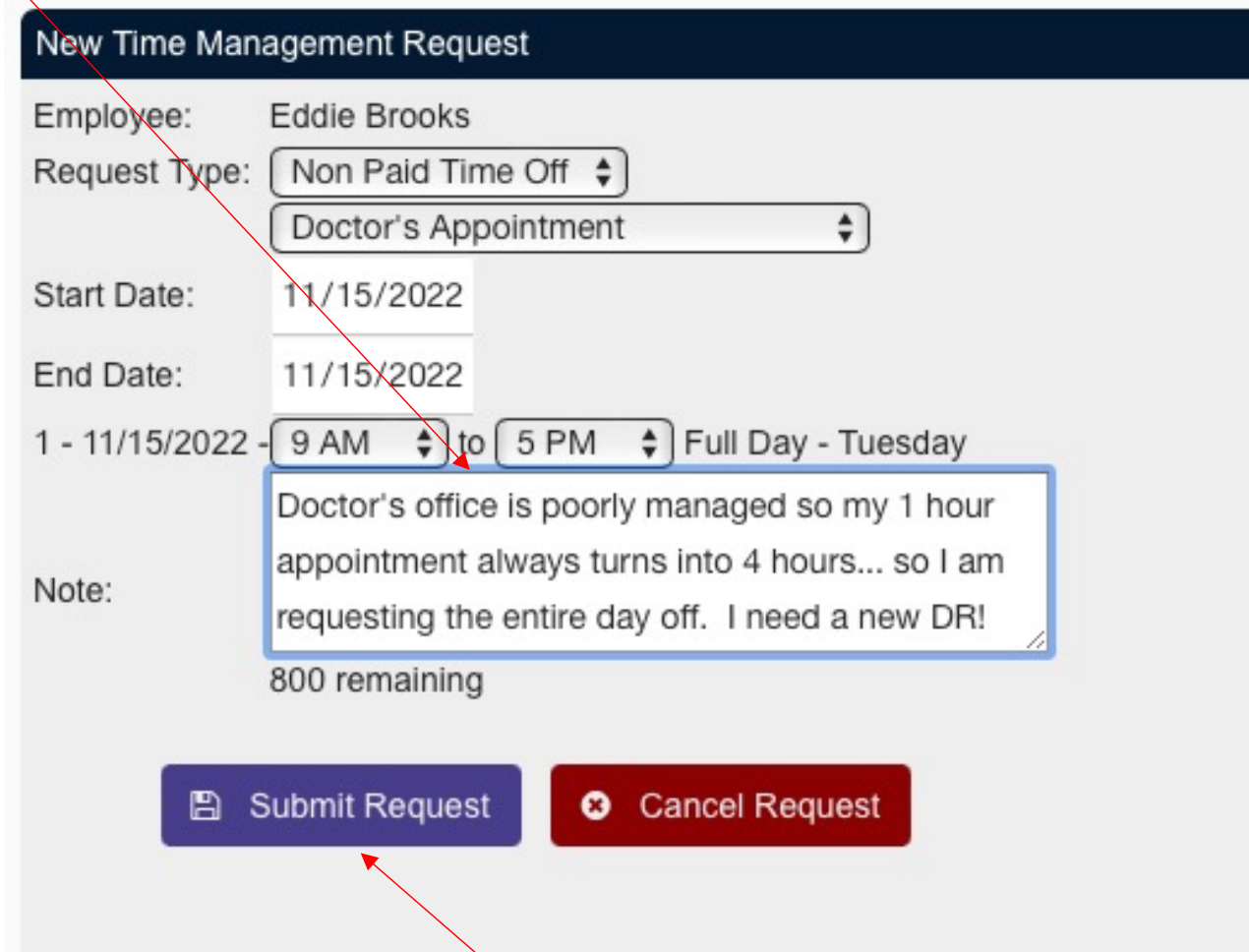


The screenshot shows the 'New Time Management Request' form. The 'Employee' field is 'Eddie Brooks'. The 'Request Type' is 'Non Paid Time Off' and the sub-type is 'Doctor's Appointment'. The 'Start Date' is '11/15/2022'. The 'End Date' is '11/15/2022'. The time range is '1 - 11/15/2022 - 9 AM to 5 PM Full Day - Tuesday'. The 'Note' field is empty. At the bottom, it says '800 remaining'.



# To Request Time off...

- Add notes that may help answer any possible questions



The screenshot shows a web form titled "New Time Management Request". The form fields are as follows:

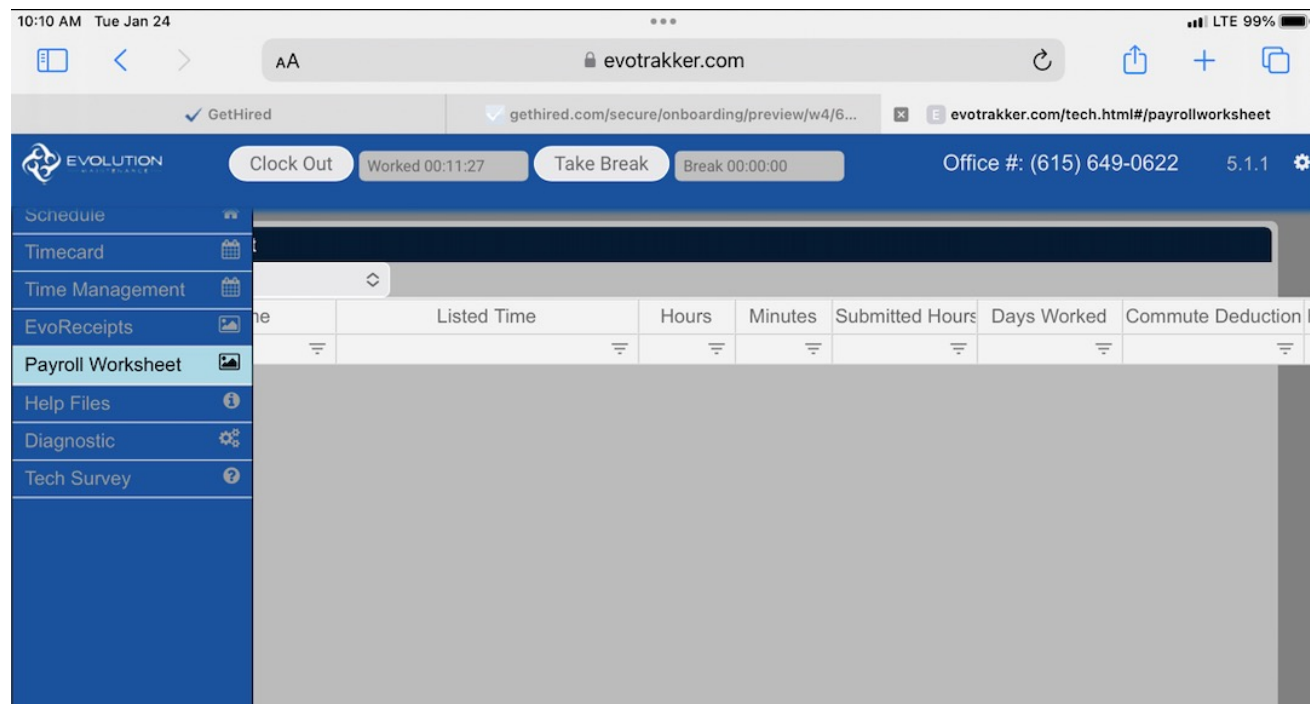
- Employee:** Eddie Brooks
- Request Type:** Non Paid Time Off (dropdown menu)
- Request Type:** Doctor's Appointment (dropdown menu)
- Start Date:** 11/15/2022
- End Date:** 11/15/2022
- Time Range:** 1 - 11/15/2022 - 9 AM to 5 PM Full Day - Tuesday
- Note:** Doctor's office is poorly managed so my 1 hour appointment always turns into 4 hours... so I am requesting the entire day off. I need a new DR! (text area with a character count of 800 remaining)

At the bottom of the form are two buttons: "Submit Request" (blue) and "Cancel Request" (red). Red arrows from the text above point to the "Note" field and the "Submit Request" button.

- When finished, click, "Submit Request"

# Time Management - All Done Through EvoTrakker

- Request will now go through the appropriate approvals
  - If >2 weeks out, request time off and ZFM will approve... if they do, it will automatically create a ticket on your schedule.
  - If <2 weeks and the ZFM approves, additional approval is required by either Eric or Daniel. If they also approve, it will automatically create a ticket on your schedule.
- 
- Payroll Worksheet view added to Tech's screens...





# How can you be successful?

**What REALLY drives performance, profits, success?**

**More insight on you will be graded**

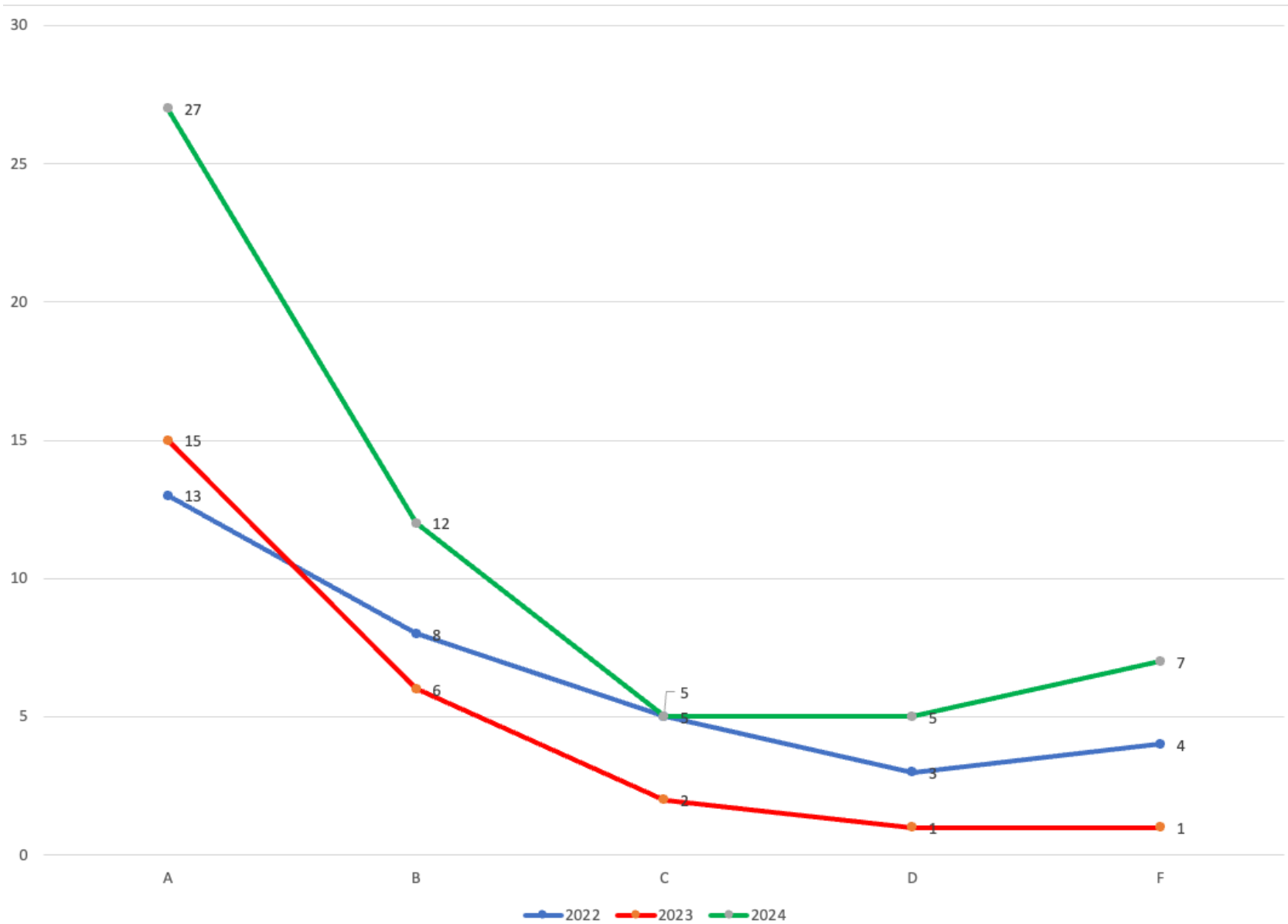
# Attendance

- If you call out during a week (sick, kid sick, weather, lazy, whatever) – NOT PREVIOUSLY REQUESTED – it is counted as a call out week
- Started tracking in 2022
- Scorecard:

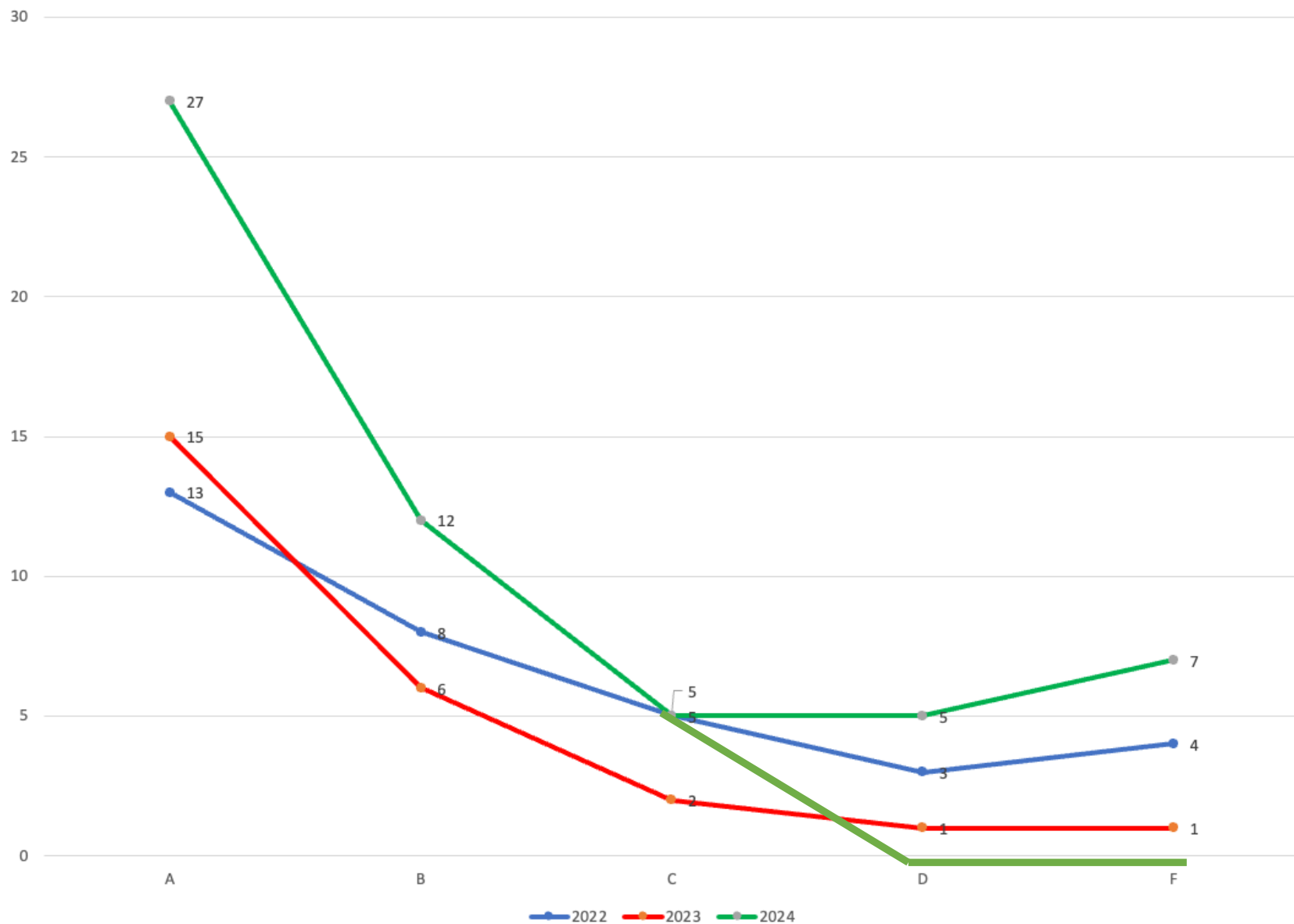
Grade	% of Weeks	Out of 52 Weeks
A	0-5%	~0-3
B	5.1-10%	~>3-5
C	10.1-15%	~>5-8
D	15.1-20%	~>8-10
F	>20%	>10 weeks!



# Attendance



# Attendance – where we want things...



# Attendance

- A & B was 21 of you in 2022 and 2023... 39 for 2024. That's good.
  - Still have highest number in D & F. That's bad.
  - 0 of the 2022 D & F are still with us.
- 
- Back to profit
    - Profitable techs are ALL A or B in attendance.
      - Only exception is MPP which we will cover later under utilization.
    - No, this (being and A or B) does not guarantee profitability but if you are C or below, there is ZERO chance of being profitable.

So... SHOW THE HELL UP!

# Numbers, What Matters, Performance


- **DO NOT** tell the complete story – for those of you into statistical analysis, the larger the group, the better the data (and stronger correlations can be) – we have 30 something techs... not a large sample so anomalies can skew things quickly
- Ratings from the teams (office rating techs, techs rating office) **DO NOT** tell the complete story
- We look at multiple things when determining your impact to the company; adjusting your pay
- DO NOT get too caught up in the numbers but trust us when we tell you to focus on certain things
- A quick look at things that do, and do not impact performance



# Field Improvements: Pending Tech Info

# Pending Tech Info

- Pending Tech Info will be covered by Brandee later today
- High points – do you think we are taking this seriously?



Clock In

Worked 00:00:00

Break 00:00:00

Office #: (615) 649-0622 6.11.02

Schedule

Timecard

Time Management

EvoReceipts

Payroll Worksheet

Help Files

Diagnostic

Tech Survey

Schedule - Show Full Day (12am to 12pm)

Quick Filter...

Day

Week

Timeline

4 Feb 2025

Today

◀ ▶

07:00

08:00

09:00

10:00

11:00

12:00

13:00

14:00

15:00

16:00

17:00

18:00

Blaike Allen

Administrative - Time Off - Non-Paid

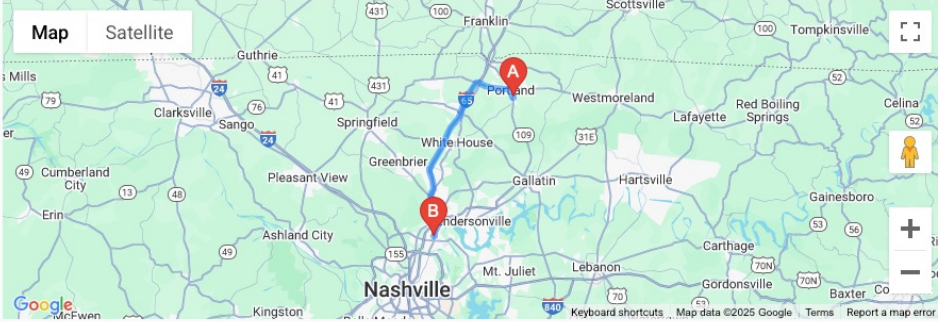
Personal (Non-Paid) - Where Ever You Need To Be

Pending Tech Info - please update the following as soon as possible

Service Request	Company	Trade	Date
1056621	Palmetto Moon	PM - HVAC	2/3/2025

Map

Satellite



A

105 Flex Ave, Portland, TN 37148, USA

31.2 mi. About 37 mins

1. Head west toward Flex Ave

102 ft

Time Off - Non-Paid

Personal (Non-Paid)

Invoiced

Enroute

# Why?

- We're going to have to send \_\_\_\_ back at no charge to confirm this, because I cannot confirm. He quoted to retrofit originally. He didn't mention if the materials onsite were correct. He didn't read the entire work order when going out originally.



# Pending Tech Info

- If something is in Pending Tech Info – Basic we are going to judge you poorly
  - Office team – give examples of things that will go into this category
- “Regular” Pending Tech Info
  - Office team – give examples of things that will go into this category

15 Pending Tech Info Work Orders Updated 2/3/25

Brandee Fox <bfox@evolutionmaintenance.com>  
 To: Zone 1 Techs; Zone 2 Techs; Cc: evozone1@evolutionmaintenance.com; evozone2@evolutionmaintenance.com; +3 more

Monday, February 3, 2025 at 8:58 AM

Below is the most recent report of Work Orders in Pending Tech Info Status.

**Please reach out to someone at the office if you need designated time on your schedule to work on these, specifically for the 5 work orders that are over a week old.**

# of WO's	Tech
01	Chad Cole
03	Dustin Cheek
03	John Romeo
01	Junior Garcia
01	Nicholas Romeo
01	Steven Kopeski
01	Susana Marroquin
01	Todd Ellis
01	Wesley Floyd
02	Wilson Ashmore

Zone	Company	Service Request	Trade	Total Due	Total Days in Current Status
1	State of TN - Lauderdale County Sites	32941-0000037496	General Plumbing	10068.49	3
2	State of TN - Morgan County Sites	20250121-6739	General Plumbing	618.75	4
2	State of TN - Sumner County Sites	20250107-8577	General Plumbing	706.25	26
1	Metro Nashville (TN) - 459923	20250123-9920	Plumbing - Metro Nashville 459923	1178.75	6
1	Clarks	271306278	HVAC Repair	42171.31	14
1	State of TN - Montgomery County Sites	20250124-8851	HVAC Repair	135	5
2	Captain D's	20250120-4373	Ice Machine	225	3
1	Jim N Nick's	302931045	HVAC Repair	311.36	3
1	State of TN - Wayne County Sites	20241210-7342	HVAC Repair	12757.59	53
1	FirstCash, Inc.	2025-0123-0021	General Plumbing	946.48	1
1	The Cheesecake Factory	86842	Interior Building	1039.91	3
2	State of TN - Hamblen County Sites	20250122-7198	General Plumbing	168.75	3
1	Petro	12732033	General Plumbing	463.13	2
1	State of TN - Shelby County Sites	20241230-9636	HVAC Repair	312	26
1	State of TN - Shelby County Sites	20241212-5974	HVAC Repair	370.5	47

Brandee Fox  
 Evolution Maintenance, Inc.  
 Direct: 615-588-8872  
 Office: 615-649-0622  
 Address: 105 Flex Avenue, Portland, TN 37148  
 Website: <https://www.evolutionmaintenance.com>



# Why are we beating this dead horse?

- Pending Tech Info is one of the largest bottleneck/black holes we have.
- Most customer complaints about tickets taking so long originate back here
- GET IT DONE WHILE ONSITE. WHILE YOU ARE CHECKED INTO A CUSTOMER'S TICKET. WHILE YOU ARE CLOCKED IN.
- When you can't (supplier not open, etc.), set a reminder on your iPad – all of you can do this starting today with nothing needing to be rolled out. Why not?
- We will let Brandee beat this dead horse more in a bit.

Event

Reminder

Contact Trane to get update

555-555-5555

Add Tags

remind me

☒ On a Day  
02/05/2025

☒ At a Time  
11:00 AM

☐ At a Location

☐ When Messaging a Person

early reminder

None

repeat

Never

priority

None

list

☒ Reminders

URL

None

images

# Pending Tech Info

- Nah, let's beat the horse more.
- Anyone like loosing out on \$10.7K? We lost that just today due to shit staying in Pending Tech Info.
- ??????????WTF??????????????



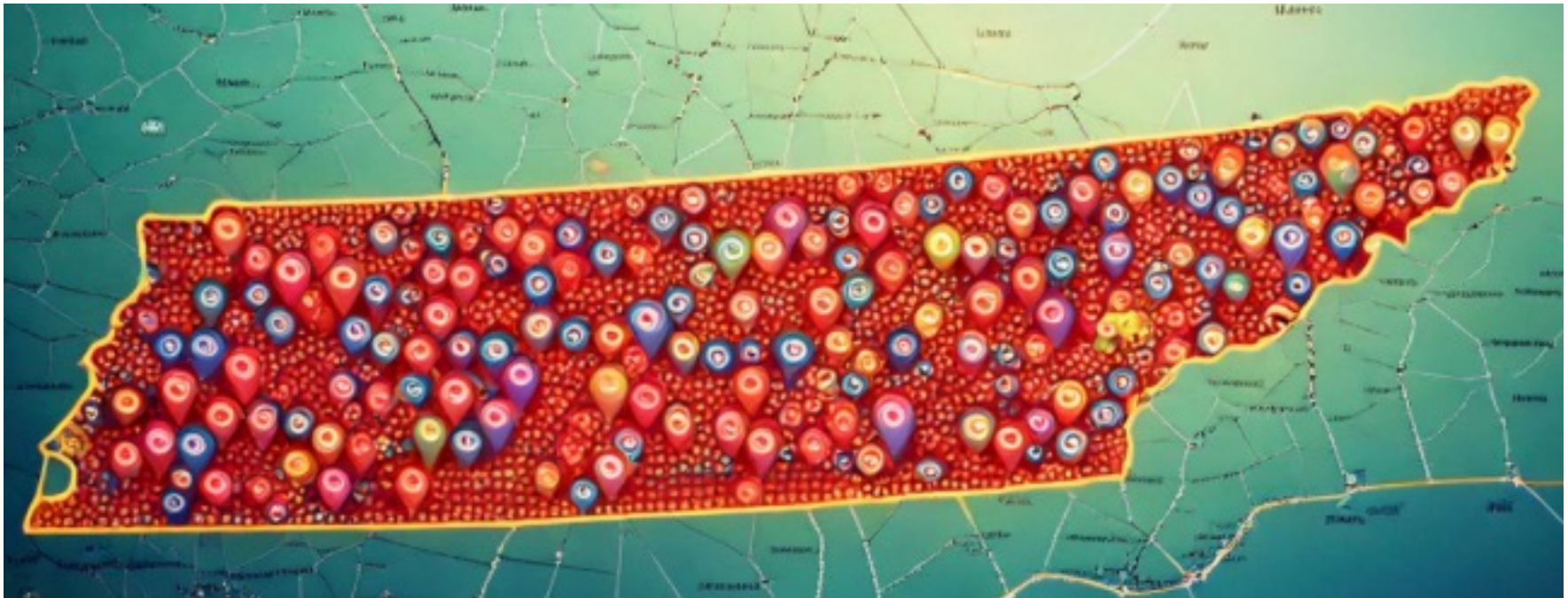
# Field/Office Improvements: Utilization

# Utilization

- Historically, when we hire a new tech, it takes them a couple of quarters to be get to profitability.
- GLARING exception has been the MPP.
- Why?
- Utilization. When you get in your vehicle and leave the house you clock in. And stay clocked in when you get home.
- HOW MUCH OF YOUR TIME IS BEING BILLED TO CUSTOMERS?
- That is your utilization time.
- MPP averaged 85%, non MPP averaged 45%.
- Profitable techs averaged roughly 50%
- Non-Profitable techs averaged less than 50%

# Utilization

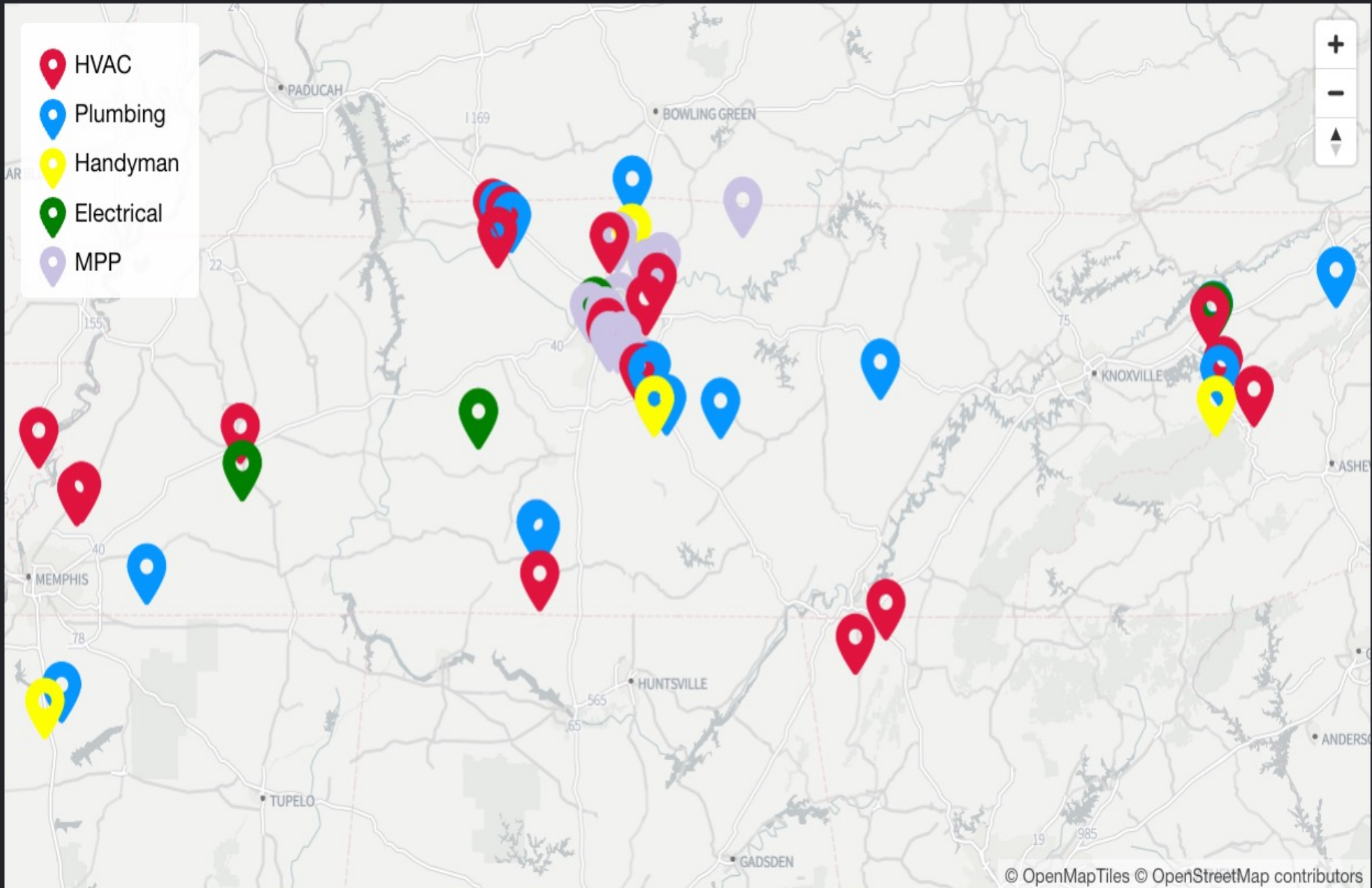
- So, what can be done?
- Spread out tech home base locations so that we have less windshield times.
- If we were maniacal evil people, we would force all of you to move the map would look more like this...







# Evolution Tech Locations





# Utilization

- Can't mass force people to relocate... too soon?
- Office
  - As we hire, we sure attempt to hire more people in the fringe areas... if someone asks about moving, we always give our, "In an ideal world" locations
  - Some EvoTrakker things coming will start to take in more and more where the tech is (working, lives) and where the next job is and attempt to reduce windshield time
- Techs
  - ALWAYS check into all tickets as soon as you possibly can. DO NOT WAIT!
  - DO NOT CHECK OUT until all possible paperwork is done. The customer requires this paperwork, they need to compensate us for it.
  - If you ever forget to check in, say something ASAP so the office can help get that time back on the customer's clock.
  - If you see something that is wasting windshield time, say something. Usually there will be a reason, but in case it was a mistake, call it out and let's fix it!

Target for utilization of your time...

- Always try to be checked into a customer's ticket at least **50% of the time** you are clocked in.
- The more and more you hit/exceed this goal, you are more likely to be profitable.



# Back to Profit

# Some still a little unclear

- Some of you are still unclear on what counts on profit, how it all works.

# Previously Presented - Components of Profit

- **What money you bring into the company**

- **Invoiced** jobs where you were the lead tech
  - Your hours
  - What we charged the customer for materials listed in the service items
- **Invoiced** jobs where you were not the lead tech
  - Your hours

MINUS

- **What you cost the company**

- Cost of Goods Sold
  - Any and all COGS purchased on your cards or charged by you on various accounts (*at time of expense, does not matter if invoiced*)
  - Any and all COGS sold purchased by the office for jobs on which you are listed the lead (*at time of expense, does not matter if invoiced*)
- Other Expenses related to you
  - Payroll/Benefits, Vehicle, Fuel, Travel/Meals, Uniforms, Administrative (iPad, Phone, Training, various supplies, etc.)

MINUS

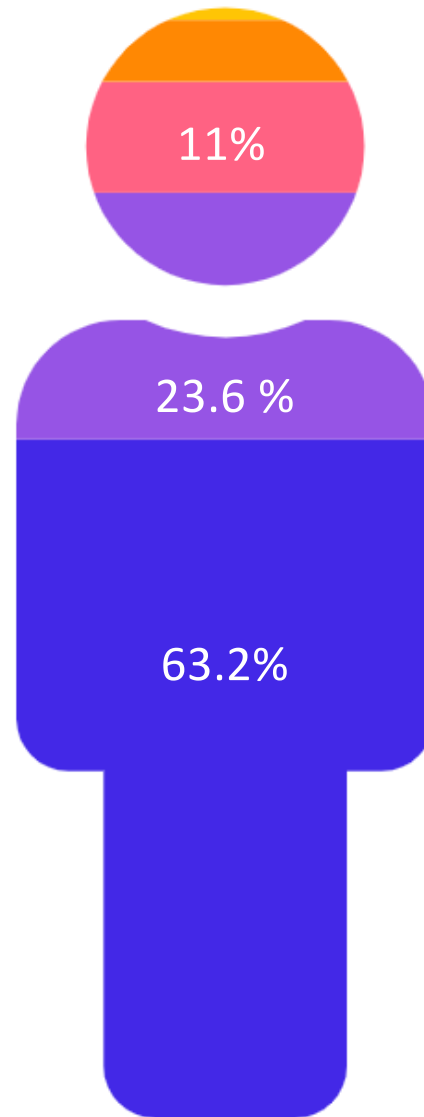
- **Your share of what it costs to exist as a company**







- Governmental taxes and fees, Various insurance plans, Other administrative (rent/utilities, professional services, banking fees, supplies, phones, various web services including EvoTrakker, shipping fees, etc.), Payroll/Benefits of office staff and management

EQUALS

Your individual overall **profit/loss** for the selected period

# The cost of a tech— no COGS/Company Zone Share



 Payroll  Fleet  Tech Benefits  Tools  Admin Costs  
 Travel







# The cost of a tech— no COGS Hourly

Let's  
pretend  
this tech  
makes  
\$20 an  
hour



All other - \$0.69

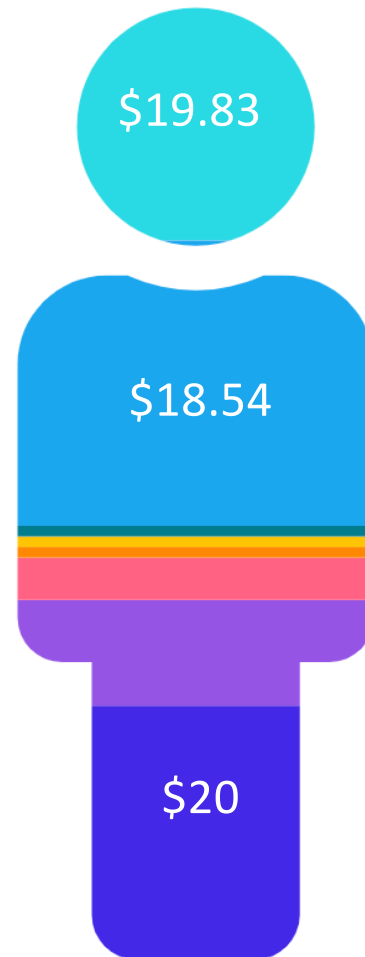
Hourly, the cost  
for this tech to  
exist is \$31.65

 Payroll  Fleet  Tech Benefits  Tools  Admin Costs  
 Travel











# Let's add in COGS and Company/Zone Costs

Let's pretend this tech makes \$20 an hour



All other - \$11.65

Hourly, this tech's cost to exist inc. COGS and share is \$70.02

 Payroll  Fleet  Tech Benefits  Tools  Admin Costs  
 Travel  COGS  Company/Zone

# Great!

- You (including COGS and Company/Zone share) cost \$70.02
- I am charging the customer \$75
- I am \$4.98 profitable! 7.1% CLOSE TO THE 10% BABY!!!!
- YES!



# Utilization

- HOW MUCH OF YOUR TIME IS BEING BILLED TO CUSTOMERS?
- That is your utilization time.
- MPP averaged 85%, non MPP averaged 45%.
- Profitable techs averaged roughly 50%
- Non-Profitable techs averaged less than 50%
- If we are not billing the customer for your time, that erodes the times that we are billing them. It's simple.



# HR Sessions

**Safety, Sexual Harrassment**

# Your salary

- This information is for you, Eric G and Daniel.
- Period.
- Based on background, what jobs we can send you on, alternate schedules, WHAT YOU NEGOTIATED!!!
- Sharing of this information with others is grounds for immediate termination.
- Couple this with questionable performance and meet the door headed out.

# 401K Program

- 173% increase in 401K balance
- 82% increase in participants!

	1/1/2022 - 12/31/2022	1/1/2023 - 12/31/2023
<b>Plan asset balance</b>	\$66,312	\$181,038
<b>Participants with an account balance</b>	11	21
<b>Average account balance</b>	\$6,028	\$8,621
<b>Participants contributing</b>	11	20
<b>Contribution total</b>	\$2,913	\$101,542

- Currently we do a 1.5% match... as I have said, you are really selling yourself (and your future self short) by not doing at least a 2% contribution!

# HR Topics

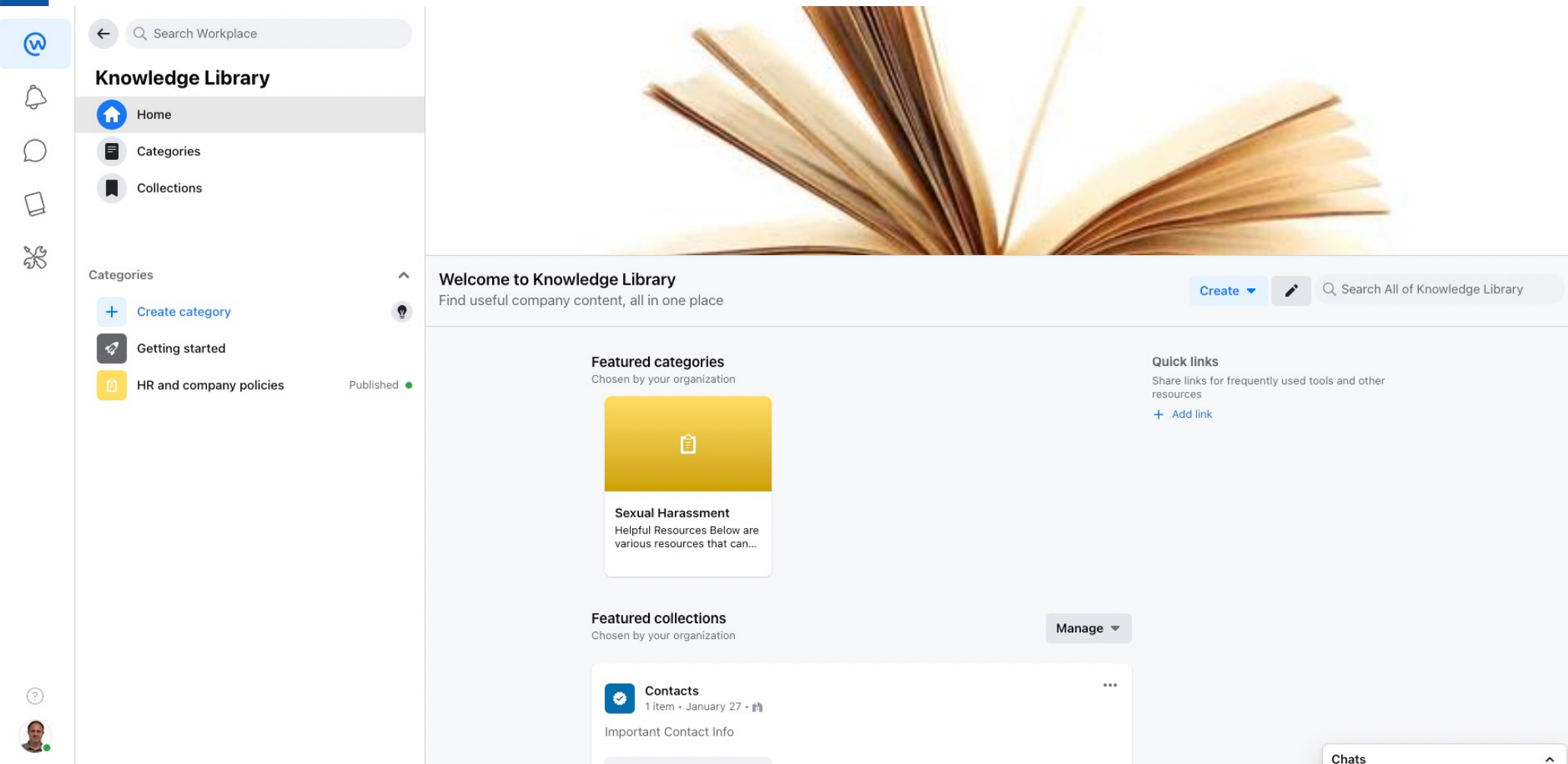
- Starting in March 2024, training at Evolution Maintenance is being taken up a notch.
- Interplay Learning/Skill Mill and Workplace
- Interplay Learning is interactive training sessions (computer, iPad, VR)
  - Onboarding Learning path – all new hires will go through this path in the Service by People Who Give a Damn Conference Room Day 1 / 2 of their onboarding
  - Trade Learning paths – specifically designed courses for techs in certain trades/skill sets
- Workplace is where we organize and communicate documents, etc. related to various HR topics
  - Safety
  - How we conduct ourselves – Sexual Harassment
  - Company policies





# Safety













- Handbook
- Multiple resources on safety training
- This orientation presentation
- These are available through the Workplace portal



The screenshot displays the Workplace Knowledge Library interface. On the left is a sidebar with navigation icons and a 'Knowledge Library' section containing 'Home', 'Categories', and 'Collections'. Below this, a 'Categories' list includes 'Create category', 'Getting started', and 'HR and company policies' (marked as 'Published'). The main content area features a large image of an open book at the top. Below the image is a 'Welcome to Knowledge Library' header with a search bar and a 'Create' button. The main content is divided into three sections: 'Featured categories' (highlighting 'Sexual Harassment' with helpful resources), 'Featured collections' (highlighting 'Contacts' with 1 item), and 'Quick links' (with an 'Add link' button). A 'Chats' button is visible in the bottom right corner.

# Personal Protective Equipment (PPE)

- Follow all safety manuals, OSHA guidelines, etc. and use the appropriate PPE for the task you are conducting. If you ever have questions, please contact your ZFM or Zone Team.
- Provided PPE – Within reason, Evolution Maintenance will cover the expense for any needed PPE (follow previously covered spending rules).
- Keep this PPE on your service vehicle

>		Sexual Harassment	Published	
∨		Safety Documentation and Po...	Published	
>		Safety - Office/Warehous...	Published	
>		Safety - PPE	Published	
>		Safety - Driving	Published	
>		Safety - Fall Protection	Published	

# Personal Protective Equipment (PPE) Examples

- Eye and face protection (safety glasses, shields)
- Respiratory protection (respirators, masks) – at least annually, make sure they fit correctly!
- Head protection (hard hat)
- Occupational foot protection (steel toe shoes)
- Electrical protective equipment (rubber gloves, shields)
- Hand protection (gloves)
- Personal fall protection systems (harness)
- Lock out/tag out materials – if you are going to work on items that need this (machinery including HVAC, electrical, anything that could be unsafe if it is turned on while you are working on it)
- IF YOUR VAN DOES NOT HAVE A FIRST AID KIT AND A FIRE EXTINGUISHER... please go get these items and keep them on your van





# Safety Homework

Over the next 5-10 days, work with your dispatcher to allow enough time to review ALL the current materials in the Knowledge Library on Workplace

Some are short, some are very long.

Take this material seriously – it protects you and the company!

After this period of time, we will get you to sign that you have reviewed and understand and agree to enact all various policies.





# BADGE PHOTOS

**HEADSHOT NEEDED!!!**

# Sexual Harassment

## A Guide for employees

Home › HR and company policies

### Sexual Harassment



Last saved by Daniel Stone • January 27 • 1 min read

Published

#### Helpful Resources

Below are various resources that can help educate and provide guidance on ensuring we comply with sexual harassment policies.

#### TAKE THIS SERIOUSLY!

We all want a great environment for all team members, customers and anyone who interacts with an Evolution Maintenance employee.

#### Important Files and Links



[Barton Resources - Sexual Harassment - A Guide for Employees](#)

Understand your role and responsibilities

LEARNING TIME! Use the Workplace app, go to the Knowledge Library and navigate to the Sexual Harassment section. Click on the file above and go through the presentation.

Once done, come back to me to sign-off that you went through the course.



**EVOLUTION**  
— MAINTENANCE —