

## Heating and Air Conditioning Specialist Evaluation Form

Employee Name \_\_\_\_\_ Department \_\_\_\_\_ Period Covered \_\_\_\_\_

Evaluated by \_\_\_\_\_ Date Completed \_\_\_\_\_ Date Reviewed with Employee \_\_\_\_\_

|   | <b>Weight</b><br>Total must equal 100% | <b>Rating</b><br>Use 1 through 5 | <b>Score</b><br>Weight x Rating |
|---|--|----------------------------------|---------------------------------|
| <p><b>Sales</b></p> <ul style="list-style-type: none"> <li>Assists in establishing sales goals.</li> <li>Assists in developing and promoting a marketing plan.</li> <li>Increases sales of heating, cooling, and plumbing products and services.</li> <li>Makes proper recommendations and applications of products sold.</li> <li>Knows prices of products and services.</li> <li>Maintains current market share.</li> <li>Assists in developing competitive marketing strategies.</li> <li>Comments:</li> </ul> |  |                                  |                                 |
| <p><b>Service</b></p> <ul style="list-style-type: none"> <li>Resolves customer complaints.</li> <li>Delivers, connects, and maintains equipment.</li> <li>Responds to after-hour calls from customers.</li> <li>Maintains product areas and pricing.</li> <li>Comments:</li> </ul>  |  |                                  |                                 |

### Rating System

5 - Outstanding    4.5 to 4 - Above standards    3.5 to 3 - Met standards    2.5 to 2 - Below standards    1 - Unacceptable

**Heating and Air Conditioning Specialist, Page 2**

|   | <b>Weight</b><br>Total must equal 100% | <b>Rating</b><br>Use 1 through 5 | <b>Score</b><br>Weight x Rating |
|---|--|----------------------------------|---------------------------------|
| <p><b>Inventory</b></p> <p>Maintains product inventory.</p> <p>Analyzes and projects customers' seasonal needs.</p> <p>Assists in evaluating product lines.</p> <p>Comments:</p>  |  |                                  |                                 |
| <p><b>Reporting</b></p> <p>Invoices all product deliveries promptly and accurately.</p> <p>Informs supervisor of outstanding conditions.</p> <p>Comments:</p>   |  |                                  |                                 |
| <p><b>Safety and Maintenance</b></p> <p>Maintains the delivery vehicle.</p> <p>Follows regulations.</p> <p>Operates delivery vehicle safely.</p> <p>Communicates safety and operating procedures to customers.</p> <p>Comments:</p> |  |                                  |                                 |

**Rating System**

5 - Outstanding    4.5 to 4 - Above standards    3.5 to 3 - Met standards    2.5 to 2 - Below standards    1 - Unacceptable

**Heating and Air Conditioning Specialist, Page 3**

|   | <b>Weight</b><br>Total must equal 100% | <b>Rating</b><br>Use 1 through 5 | <b>Score</b><br>Weight x Rating |
|---|--|----------------------------------|---------------------------------|
| <p><b>Job Knowledge</b></p> <p>Understands the requirements of the job.<br/>                     Comments:</p>  |  |                                  |                                 |
| <p><b>Quality of Work</b></p> <p>Work is accurate and neat.<br/>                     Comments:</p>  |  |                                  |                                 |
| <p><b>Quantity of Work</b></p> <p>Consistently performs an adequate amount of satisfactory work.<br/>                     Comments:</p>   |  |                                  |                                 |
| <p><b>Cooperation</b></p> <p>Works well and effectively with co-workers and supervisors.<br/>                     Supports company policies and goals.<br/>                     Comments:</p> |  |                                  |                                 |

**Rating System**

5 - Outstanding    4.5 to 4 - Above standards    3.5 to 3 - Met standards    2.5 to 2 - Below standards    1 - Unacceptable

**Heating and Air Conditioning Specialist, Page 4**

|   | <b>Weight</b><br>Total must equal 100% | <b>Rating</b><br>Use 1 through 5 | <b>Score</b><br>Weight x Rating |
|---|--|----------------------------------|---------------------------------|
| <p><b>Initiative</b></p> <p>Begins assignments without direction and recognizes the best way of accomplishing tasks.<br/>                     Comments:</p>   |  |                                  |                                 |
| <p><b>Attendance and Dependability</b></p> <p>Can be relied upon to report to work and stay on the job.<br/>                     Comments:</p>  |  |                                  |                                 |
| <p><b>Problem Solving</b></p> <p>Handles on the job problems.<br/>                     Comments:</p>  |  |                                  |                                 |
| <p><b>Other Duties</b></p> <p>Upholds cooperative policies.<br/>                     Performs other duties as assigned by management.<br/>                     Enforces and upholds the cooperative's credit policy.<br/>                     Comments:</p> |  |                                  |                                 |
| <p><b>Total Score =</b></p>   |  |                                  |                                 |

**Rating System**

5 - Outstanding    4.5 to 4 - Above standards    3.5 to 3 - Met standards    2.5 to 2 - Below standards    1 - Unacceptable

| <b>Weight</b><br>Total must<br>equal 100% | <b>Rating</b><br>Use 1 through 5 | <b>Score</b><br>Weight x<br>Rating |
|---|----------------------------------|------------------------------------|
|---|----------------------------------|------------------------------------|

**Overall Merit Rating**

- 451 - 500 - Outstanding
- 351 - 450 - Exceeds Standards
- 251 - 350 - Met Standards
- 151 - 250 - Below Standards
- 100 - 150 - Unacceptable

Signature of Manager/Supervisor \_\_\_\_\_ Date\_\_\_\_\_

Signature of Employee \_\_\_\_\_ Date\_\_\_\_\_

**Rating System**

5 - Outstanding    4.5 to 4 - Above standards    3.5 to 3 - Met standards    2.5 to 2 - Below standards    1 - Unacceptable