Team Meeting

July 31,2024

**Ultipro notes:**

UNPAID FLEX TIME OFF

Regular full-time employees who are regularly scheduled to work forty (40) hours per week will be

given eighty **(80) hours every calendar year** of Unpaid Flex Time Off (UFTO).

UFTO will not accrue or roll over from year to year. If an employee terminates without having used UFTO, the unused

portion will not be paid to the employee.

*Using Unpaid Flex Time Off*

Employees **may use UFTO for any reason**, but the time off should be scheduled in advance and be pre-approved by the

employee’s supervisor or manager. **Employees are not required to exhaust PTO before using UFTO**.

Exempt employees may request UFTO in 8-hour increments. UFTO requests for non-exempt employees must be a

minimum increment of one half-hour.

*Scheduling*

Employees must schedule and request UFTO in advance. If the need is not foreseeable due to illness or other

emergency, the employee must give notice as soon as practicable. Generally, at least one day of advance notice

is required for requests of one to four days. Requests for five or more consecutive working days should be

submitted at least two weeks prior to the UFTO request.

In the event a dispute arises over scheduling, the needs of the department and the employee’s needs are

considered carefully. The employee requesting time off first will normally have priority over requests from

other employees.

*PTO Accrual*

The Company has established a **Paid Time Off (PTO)** program for all regular employees. Eligible employees may use accrued PTO for **vacation, sick leave, or any other time off from work for personal reasons**. All PTO must be pre-approved by the employee’s supervisor or manager unless it is an unplanned absence due to illness or other emergency. PTO maximum accrual is equal to 1.5 times the employee’s annual accrual rate. Once an employee reaches the maximum accrual rate, no additional PTO will accrue. PTO accrual will resume when the employee has used enough PTO to fall below the maximum accrual amount.

YEARS OF SERVICE ANNUAL ACCRUAL RATE MAXIMUM ACCRUAL

Up to 5 years 120 hours 180 hours

5 to 10 years 160 hours 240 hours

10 years or more 200 hours 300 hours

Each week Quinten and I have to approve timecards in Ultipro. The goal is to reconcile each day to total 8 hours. 8 working hours is each persons schedule in Ultipro + lunch, so the system is expecting one or more of the following that total 8 hours;

 Time punches = worked time

 UFTO= non-worked time unpaid

 PTO= non-worked time paid

PTO= 4.6167 Hrs/pay period

UFTO=80 Hours for the year



 END OF THE YEAR SHUT DOWN example ( you will need to have UFTO or PTO available for Dec 26,27 and 30)



STAFF UPDATES:

 French- Offer out to candidate

 German- Pending HR stuff

 Spanish- Accepted offer , start date is Aug 19th

**Introduction for Mini PMO**

 Full PMO process= Tool used to track new product launches through phase gates

*Challenge for years was that there was no formal process when a product manager releases updates to a existing product.*

What does this mean to an individual technician?

Your tasks are major contributions in defining needs.

 Requests for new or updated information should be a Tasks.

**When to do a task?**

* + Macro updates or changes
	+ External Support page updates or changes
	+ Internal Support page updates or changes
	+ Website updates or changes



**Stats provided leadership each week and overall trends for this season so far.**

* Weekly calls Total  2778    Pro/ROI:   Pro: 1611   /  ROI: 1167
* Avg Homeowner Talk time  9:05
* Avg Pro Talk time 8:38
* 11% escalation
* 48 hour written response , written cases this week closed 1226
* Pro avg wait time 7:28

 Staff update    Applicants  German/French Speaker and Spanish Speaker. HR presenting offer this week.

ROI went live April 5th 2024. July 1-29 so far 11,239 Offered calls/ 4778 are ROI

**Shipping Update:**

 We are moving to **shipping only every 2 weeks**. All shipping requests this week will be filled if inventory is available but starting next week it will only be every 2 weeks, please inform customers. Again, customers should be doing warranty claims in the channel.

 Some shipping requests that are older than July need review by the technician, call the customers and inform them we do not have the products.

HOW TO TELL THE STATUS OF YOUR SHIPPING REQUEST

New= submitted by technician, On order= means a order has been placed with customer service (they do not provide ETA’s), backorder means there is none in inventory at the time of order. E1 is the ERP system used by customer service.



**Team Topic Requests**

* End of year gathering/ update

 Tentative schedule dates Week of December 8-14. My goal is alignment with PM’s, Profit Share Day and Holiday Party.

 Laptop Upgrades, training and fun

* I (we) spend a lot of time trying to capture information from customers calling in.  If the data was useful, I understand capturing it, but in the case of a contractor is knowing the company name and phone number worthwhile.  Don’t get me wrong, I don’t want to take the time to capture their address and other information that would make the data useful due to time constraints.
* Training Updates and Projects
	+ Working with team to better enhance our internal training and timelines
* Review 2024 Lookback Document location with team
	+ [ TEAM - 2024 Look Back.xlsx](https://hunterindustries365.sharepoint.com/%3Ax%3A/r/sites/TechService1943/_layouts/15/Doc.aspx?sourcedoc=%7B7579EC4B-E60E-48B9-BE09-E4352242152E%7D&file=TEAM%20-%202024%20Look%20Back.xlsx&action=default&mobileredirect=true&wdsle=0)
* Please ask team about NEW Hydrawise app support pages needed now versus later. I’ll be forever grateful. They are the experts, not me.
	+ The new app support section will not be as cluttered as the old app support.
	+ What should we move over next? Wi-Fi? Customer manager tools?
	+ Half are currently moved
	+ Specific topics
	+ **Add them to tasks after the meeting**
* Training needed list
	+ I added here [ Training topic Requests.xlsx](https://hunterindustries365.sharepoint.com/sites/TechService1943/_layouts/15/doc.aspx?sourcedoc=%7bf9f9c3ab-298e-4dc5-9f7e-1213e2af38ab%7d&action=edit)
* Mini PMI Process
	+ General update
* Hydrawise updates
	+ SN allocation update coming soon?