

Creating an In-House Training Program

"The most common complaint I hear from door dealers is how difficult it is to find and keep qualified garage door techs. Regardless of how many ads they place on even the most popular job boards, the results are mostly the same – an abundance of inexperienced applicants with limited or no mechanical skills. I am often asked why there is such a shortage, even during the pandemic when the garage door industry (an essential service) remains at full employment levels. The answer is that the shortage began long ago."

Entire generations of workers have been trained to work with computers rather than with power tools. The notion of getting your hands dirty at work became uncool to upcoming generations of learners, reinforced by expectations that our kids go to college to become doctors, lawyers or other white-collar professionals. Though there are young people in the workforce inclined to do mechanical work, there are fewer of them, causing employers to compete for their services.

This staffing dilemma is not new. I was a door dealer for thirty-three years and for most of them, we faced this same problem. Perhaps not to the same degree, but the challenge was there. Our only option was hiring people with minimal mechanical experience and training them from scratch. For every ten people we hired, we would probably only end up keeping one. The standard training routine we had used for years just wasn't working for us anymore. We'd hire an apprentice, send them out with our lead tech,

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“Bubba,” and hope that in time, the new hire would learn to be a productive tech. This approach to training was not sufficient to sustain the level of talent we needed to develop and nurture. Not to mention, being a great tech did not necessarily make Bubba a good teacher. There had to be a better way.

Time to Bite the Bullet

With all due respect to the Bubbas out there, it is not realistic to expect an employee to perform at the highest level without proper training. For door dealers, it takes a real investment in training to get the kind of reliable performance needed from new field personnel. We came to that conclusion during an exit interview with one of the many hires who chose to hit the road after being with us for only a few months. When asked why he was leaving, he responded that he wasn’t getting the training he needed to perform the job safely. He also let us know that the tech he was working with used him as a “gofer” rather than training him as an apprentice. He therefore did not see a favorable future with our company. That was difficult for us to hear, but it brought us to the realization that we needed to implement a real training program to slow down, or even get ahead of, the attrition in our industry. We needed a ‘real’ training program.

Getting Started

There was no blueprint to help us build and implement a training program. So I first turned to my own experience while serving in the Navy. There, I was tasked with creating a shipboard training program to address a shortage of barbers. For that project, I began with these questions:

1. What is the goal?
2. Who will serve as instructors?
3. What will we teach?
4. How will we teach?
5. Where will we teach?

The goal was training enough barbers to service the 4,500-man crew aboard our aircraft carrier. Who would teach was limited to me and the five other barbers aboard the ship. What we would teach were basic haircutting skills. We would do this by drawing on our own barber school training. Where we would teach was in one of the three shipboard barber shops. With those questions answered, we set about

building our training program. Within two short months, we had successfully provided six barbers with the enough basic training to service the full onboard crew.

When it was time to start a training program for our garage door business, I began by answering a similar set of questions.

- **Goal:** Ongoing recruitment and training of sufficient techs to keep pace with production and turnover.
- **Who:** I would be the instructor, with support from our lead tech and eventually employees from each area of the business. We’d also look to the manufacturers we represented for additional training resources.
- **What:** We would create our own hands-on curriculum for training new hires to become residential garage door installers.
- **How:** We would draw on our own knowledge and work experience, and utilize any relevant industry training materials available.
- **Where:** Training would take place in our conference room and warehouse space, with a goal of one day having a dedicated training area for both classroom and lab.

“When” remained the only unanswered question. I gave myself sixty days to develop the curriculum and a schedule. We would begin in the first quarter of the year, typically our slowest period. We were on our way!

Curriculum Development

Our first class would focus on the basics of garage door installation. We called it Garage Doors 101. We discovered that documenting what you want to teach is a highly important step. You may know this business backwards and forwards, but when teaching others technical subjects, it is imperative to put it in writing. With our notes, we began by creating an outline of garage door installation. To that, we incorporated PowerPoint slides to visually enhance the information. For hands-on training, we outlined the steps of an installation from start to finish. By using the outline consistently in each training session, we were able to evaluate the trainee’s grasp of the material. We created quizzes on the classroom training too, and our lead tech gave scores based on

Garage Doors 101 Class Schedule				
	Time	Activity	Location	Instructor
Day 1	8:30 - 8:45	Welcome and Introductions	Classroom	Dan / Gary
	8:45 - 9:00	Course Overview	Classroom	Dan / Gary
	9:00 - 9:15	Ground Rules, Facility Orientation	Classroom	Dan / Gary
	9:15 - 9:45	Module 1 - History	Classroom	Dan / Gary
	9:45 - 10:30	Module 2 - Anatomy	Classroom	Dan / Gary
	10:30 - 10:40	Break		
		Quiz #1	Classroom	Dan
	10:45 - 11:15	Module 3 - Track Systems	Classroom	Dan / Gary
	11:15 - 12:00	Module 4 - Counterbalance System	Classroom	Dan / Gary
	12:00 - 1:00	Lunch		
	1:00 - 2:30	Module 5 - Opening Preparation	Classroom	Dan / Gary
	2:30 - 2:40	Break		
		Quiz #2	Classroom	Dan
	2:45 - 3:15	Module 6 - Tools & Equipment	Classroom	Dan / Gary
3:15 - 4:30	Module 7 - Planning and Preparation	Classroom	Dan / Gary	
4:30 - 5:00	Module 8 - Truck Organization	Tech Lab	Gary	
Day 2	8:30 - 9:00	Module 9 - Safety	Classroom	Dan / Gary
	9:00 - 10:00	Module 10 - Installation Procedures & Techniques	Classroom	Dan / Gary
	10:00 - 10:30	Installation Video #1	Classroom	Dan / Gary
	10:30 - 10:40	Break		
		Quiz #3	Classroom	Dan
	10:45 - 11:15	Critique installation video	Classroom	Dan / Gary
	11:15 - 12:00	Module 11 & 12 - Communication / Documentation	Classroom	Dan / Gary
	12:00 - 1:00	Lunch		
		Part 2 - Garage Door Openers	Classroom	Dan
	1:00 - 1:15	Module 1 - History of GDO's	Classroom	Dan
	1:15 - 1:45	Module 2 - Anatomy	Classroom	Gary
	1:45 - 2:15	Module 3 - What Makes It Tick?	Classroom	Dan / Gary
	2:15 - 2:30	Module 4 - Drive Systems	Classroom	Dan / Gary
	2:30 - 2:40	Break		
	Quiz #4	Classroom	Dan	
2:45 - 3:15	Module 5 - Regulatory Requirements	Classroom	Dan / Gary	
3:15 - 3:45	Module 6 - Installation Procedures	Classroom	Dan / Gary	
3:45 - 4:30	Installation video #2	Classroom	Dan / Gary	
Day 3	8:00 - 9:30	Observe installation of garage door	Tech Lab	Gary / Dan
	9:30 - 12:00	Installation #1 (Garage Door)	Tech Lab	Gary
	12:00 - 1:00	Lunch		
	1:00 - 2:00	Complete installation #1	Tech Lab	Gary
	2:00 - 4:30	Installation #2 (GDO)	Tech Lab	Gary
4:30 - 5:00	Review	Tech Lab	Gary / Dan	
Day 4	8:00 - 12:00	Installation #3 (Garage Door)	Tech Lab	Gary
	12:00 - 1:00	Lunch		
	1:00 - 2:00	Complete installation #3	Tech Lab	Gary
	2:00 - 4:30	Installation #4 (GDO)	Tech Lab	Gary
4:30 - 5:00	Review	Tech Lab	Gary	
Day 5	8:00 - 10:30	Installation #5 (Garage Door)	Tech Lab	Gary
	10:30 - 12:00	Installation #6 (GDO)	Tech Lab	Gary
	12:00 - 1:00	Lunch	Student Lounge	All
	1:00 - 2:00	Other Installation Techniques	Tech Lab	Gary
	2:00 - 3:00	Removal of all doors & operators	Tech Lab	Gary
	3:00 - 3:30	Review	Classroom	Dan
	3:30 - 3:45	Break		
	3:45 - 4:15	Final Exam	Classroom	Dan
4:15 - 5:00	Graduation & Photos	Classroom	Dan / Gary	

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For technical training, we used a 3-step method:



Step 1
Instructor performs the task while the trainee watches



Step 2
Instructor and trainee perform the task together



Step 3
Trainee performs the task while the instructor watches

the trainee's solo installation on the last day of the class. Garage Doors 101 began as a three day training (1 classroom, 2 hands-on), but grew to a week-long class with 2 days of classroom training and 3 days of intensive, hands-on instruction.

Using the same methodology, our curriculum expanded over time to include training for all of our employees. When you find something that works, stick with it!

Teaching Method

For technical training, we used a 3-step method (see example photos, above):

- **Step 1** – Instructor performs the task while the trainee watches
- **Step 2** – Instructor and trainee perform the task together
- **Step 3** – Trainee performs the task while the Instructor watches

Developing the Training Schedule

When is the best time to schedule training? Since we were busy, I had to "create" time for training in our everyday business schedule. Our service and installation schedules were always top priority, but we made time for training by scheduling it like we would any job. By budgeting time on instructor and trainee schedules in advance, we were able to reassign work to those not participating in training and not lose production. We also held training sessions before or after normal business hours, or on Saturdays. Over time our 3-day Garage Doors 101 class grew into a full blown training program, benefiting not only field operations but sales, customer service and accounting personnel.

TRAINING SCHEDULE - JAN / FEB / MAR

No.	Date	Day	Time	Session Name	Description	Instructor	Who Needs to Attend?
1	11-Jan	Th	7:30 - 8:30	Remember Charlie Video	Safety Training	Dale	All field service personnel
2	23-Jan	Tu	9 - 12:00	Raynor Product Overview	Residential and commercial door product review.	Bill	All new sales and customer service people.
3	25-Jan	Th	7:30 - 8:30	Ergonomics	Safety Training	Dale	All field service personnel
4	8-Feb	Th	7:30 - 8:30	Accident Prevention and Reporting	Safety Training	Dale	All field service personnel
5	10-Feb	Th	7:30 - 8:30	Forklift / Scissors LR Training	Safety Training	Ben	All field service personnel
6	14-Feb	W	2 - 3:30	GPS System Overview	Introduction to GPS tracking.	Kathy	All Managers
7	22-Feb	Th	7:30 - 8:30	Forklift Pre-Use Inspection	Safety Training	Ben	All field service personnel
8	26-Feb	M	12 - 1:00	Entering Work Orders	Basic order entry procedures	Evelyn	All new sales and customer service people.
9	27-Feb	Tu	9 - 10:30	How to Sell Entry & Patio Doors.	Learn selling techniques from a professional entry door salesman with over 15 years experience.	Mfg Sales Rep	All all sales and customer service personnel.
10	28-Feb	W	10:30 - 12:00	Intro to Awnings	Basics of retractable awnings	Dan Apple	All outside sales and customer service people
11	14-Mar	Th	7:30 - 9	Installing Solid Shafts	Learn the proper way to install and sectional doors with solid shaft.	Ben	All field service personnel
12	14-Mar	Th	9 - 4:30	Garage Doors 102	The selling side of garage doors and operators for people new to the business.	Dan	All new sales and customer service people.
13	3-Mar	Th	7:30 - 9	Installing High Lift Track	Learn how to install high lift track for sectional overhead doors.	Ben	All service personnel.
14	7-Mar	W	7:30 - 8:30	New Employee Orientation	A formal welcome to the company and overview of company's culture and policies.	Dan	All new employees hired during the quarter.
15	8-Mar	Th	7:30 - 9:00	Servicing Residential Operators	Troubleshooting basics for garage door operators. Service tips and repair techniques. Based on Chamberlain and Allstar operators.	Troy	All service personnel with less than 1 year of service. All customer service personnel.
16	12-Mar	M - F	8 - 4:30	Garage Doors 101	Introduction to mechanical aspects of garage doors and operators. 2 days of classroom and 3 days of hands on training.	Dan / Gary	Required for all service, customer service and sales people with less than 1-year service.
17	15-Mar	Th	10:30 - 11:30	Processing COD's and Credit Card Sales	Sounds easy but you need to know the proper way to do these.	Shannon	All sales and customer service personnel.
18	15-Mar	Th	7:30 - 8:30	Fire Prevention	Safety Training	Dale	All field service personnel
19	16-Mar	F	1:00 - 5	Estimating Basics	Learn how to estimate a residential and commercial door job from scratch.	Dan	All sales and customer service reps.
20	22-Mar	Th	2:00 - 3:00	Storm Doors 101	Learn the basics of selling storm doors.	Robert	All sales and customer service reps.
21	22-Mar	Th	7:30 - 9	Selling Repair Parts to Help You Make Your Production Quota	Selling repair parts can be profitable for you and the company. It's also the proper way to do repair work.	Mark	All service personnel
22	28-Mar	W	6:30 - 7:30	Quarterly Mechanic's Breakfast Roundtable with Dan	Open forum to discuss issues from the field.	Dan / Ben / Scott	All field service personnel.
23	29-Mar	Th	7:30 - 8:30	Flammable / Combustible Liquids	Safety Training	Dale	All field service personnel
24	30-Mar	F	1:30 - 3	Microsoft Outlook Training	Basics of using Outlook	Sandy	All sales and customer service reps.
25	31-Mar	Sa	9 - 12:00	Storm Door Installation	Storm doors can be installed very easily but there are a few tricks you need to know.	Kenny	All commercial and residential mechanics.
26	31-Mar	Sa	9:00 - 2:00	Providing Exceptional Customer Service	4-part interactive video training that focuses on the basic elements of providing great customer service.	Dan	All customer service personnel.

Attendance to these sessions will be done in one of two ways. Those personnel deemed to need this training will be required to attend as our schedule permits. The second way will be strictly on a voluntary basis. Compensation for training of hourly personnel before or after normal working hours will be paid their regular hourly rate, no overtime will be allowed. Training hours logged will have a direct impact on pay raises. The company is investing a great deal of time and resources in this training program. These sessions will help you learn your trade faster, which will allow you to advance quicker. Lunch will be provided for those sessions that last all day. The Education Coordinator will have sign-up sheets posted on the training bulletin board and in the breakroom not less than 7 days prior to the session. Each instructor is responsible for creating and duplicating session handouts or other educational materials needed.

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Drafting Instructors

At the onset, we knew we would need to lean on our own staff to serve as training instructors. That posed a challenge, since most had not previously taught formally. I worked with staff members on best practices for teaching (training the trainers) to effectively impart their specialized subject knowledge. I asked each to develop an outline of what they intended to teach and use it as the basis of a lesson plan. We also compensated staff for serving as instructors, since teaching was beyond the scope of their normal duties. Typically, I would sit in on their first class and offer praise and tips for improvement afterward. In time, drafting our employees as instructors turned into a win-win for all concerned.

Other instructors came to us through our suppliers. After learning the scope of our training program, several manufacturers offered their help. If we needed to conduct garage door opener troubleshooting training, a supplier would send someone from their plant to conduct the session. This proved to be especially helpful with sales training for new products and services.

Industry Resources



My company first joined Door & Operator Dealers of America (now known as IDA) in 1979. One of their groundbreaking offerings at that time was a ten session video training program available with a Labelle projector. Users

could view the presentations on the small, built-in screen or on a wall for a larger audience. Subjects ranged from technical training on garage doors to sales and managerial training. Though basic, the training was still relevant twenty years later, so I incorporated them into our training program.

I'll bet some of you reading this article still have your old Labelle! While that resource is no longer available in person or online, today, IDA offers online training through their website portal at <https://idaeducation.org/select-classes/>.

Some manufacturers offer online technical training products. The Apple Group offers live, online training on a variety of subjects. A complete list of our training options can be found at <https://www.applellc.net/services/training-seminars.php>.

Big Investment, Big Return

Without question, training comes at a significant cost. Prices for industry training resources vary, from free to several hundred dollars or more. Hands-on training from manufacturers is at the higher end of the training cost spectrum, whereas pre-recorded training tends to be much less expensive. We found that a mixture of training resources works best when building a strong, in-house training curriculum.

While some may balk at spending resources on training, they usually agree that a good work force is a well-trained work force, and that it's best to train your new hires and staff properly due to liability issues. Allowing employees to provide installation and service without the proper skills is a big risk. Though accidents and mishaps are part of doing business, you want to guard against them through proper training. Employees are more likely to stay with an employer that offers professional development training and safety best practices to help them further their careers.

Door dealers make many kinds of capital investments in their businesses. \$50K on a service truck, \$20K for a new scissors lift, or \$100K for a warehouse addition. However, the decision to invest in training is often not an easy one. Perhaps it is the lack of instant results. Buy a truck and it is on the street making money for you in just a few days, but training takes time. Implementing

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Big Investment & Big Return

An example is Shawn, who came to us knowing nothing about garage doors. What Shawn did bring to the table was a great attitude and an interest in learning. We put Shawn through our training program and he developed skills that will last a lifetime. In fact, Shawn became one of the most productive techs on our staff. His production in the second year alone easily covered the cost of his garage door training. Shawn is still with the company and has been producing at a high level for more than thirteen years. Now that is a great return on investment!

a training program is a methodical investment in the dealer's culture that develops and evolves over time. When done effectively, it provides tremendous benefit to your business and your bottom line. An example is Shawn, who came to us knowing nothing about garage doors. What Shawn did bring to the table was a great attitude and an interest in learning. We put Shawn through our training program and he developed skills that would last a lifetime. In fact, Shawn became one of the most productive techs on our staff. His production in the second year alone easily covered the cost of his garage door training. Shawn is still with the company and has been producing at a high level for more than thirteen years. Now that is a great return on investment!

The End Game

Our goal was to use training to produce professional installers and service techs to fill immediate and ongoing need. The training program we created and implemented provides a career development path that benefits new hires and our company. It was not easy, but the result is a big business boost to all involved.

Recruiting talent requires a bit of selling, and a competitive advantage. Applicants choosing between two door dealers for their next career are more likely to choose (and stay with) the job that offers career development and safety training opportunities.

Stay tuned for Part Two in the next edition of *ID&O Magazine*.



OVERHEAD DOOR TECHNICIAN Development Timeline

The following time line summarizes the training and practical experience needed for garage door techs progressing through the various levels of training, experience and certification at XYZ Door.

Tech Grade Levels

- Level I - Overhead Door Apprentice - works as an apprentice / helper during first 6 months minimum.
- Level II - Garage Door Tech - installs and services residential garage doors unassisted.
- Level III - Sectional Door Tech - installs and services commercial sectional overhead doors unassisted.
- Level IV - Coiling Door Tech - installs and services rolling steel service and fire doors, shutters and grilles.
- Level V - Master Overhead Door Tech - all of the above plus serves as a company tech instructor / mentor.

Months 1-3

- New employee orientation
- Ins-processing
- Physical, drug screening, background check
- New employee field safety training
- Representing the company onsite
- Warehouse duty (1 month maximum)
- Assign senior tech mentor
- Work in field as **Overhead Door Apprentice**
- Complete all introductory garage and sectional door related online courses #G1, G2, G3 - G6 (AG)
- Complete training: residential garage door and opener labs 1 and 2
- Complete PPE and Fall Protection training, lab 1A, 1B
- Complete ladder safety, introductory aerial lift and fork lift in-house training: labs 2A, 3A, 3

Months 4-6

- Continue as Overhead Door Apprentice
- Complete residential garage door and GDO installation training, labs 1, 2
- Enroll in cutting / welding school (if needed)
- Complete aerial lift training certification
- Complete forklift training certification
- Complete UL325 training (classroom / lab)

Months 7-12

- Continue as Overhead Door Apprentice
- Complete garage door repair training, labs 11 - 13
- Complete GDO troubleshooting and repair, classroom and lab 14A (vendor provided)
- After successful completion of live exercise #16, garage door and opener installation solo
- Promotion to Garage Door Tech**
- Spent balance of this time working as a residential installation and repair tech or apprenticing with senior techs

Months 13-15

- Continue working as Garage Door Tech and Overhead Door Apprentice
- Complete IDEA Residential Installer Certification program
- Begin commercial sectional training, complete sectional door installation training, labs 3, 4
- Complete commercial CDO installations training, lab 5
- Complete any manufacturer sponsored hands-on technical training for sectional doors (offsite)
- Complete sectional door troubleshooting and repair training: labs 11 - 13
- Complete live exercise commercial sectional door installation (solo), lab 22
- Promotion to Sectional Door Tech**
- Begin coiling door training, complete online training introduction to coiling doors, #G4 (AG)
- Complete coiling doors installation training, labs 6, 8, 9
- Complete coiling fire doors and shutters training, labs 7, 8A
- Complete manufacturer sponsored hands-on technical training for coiling service and fire doors
- Work with senior techs on all types of coiling door applications in field
- Enroll in IDEA sectional and rolling door certification program.

Months 16-24

- Continue working as Garage Door Tech and Sectional Door Tech and Coiling Door Tech Apprentice
- Complete coiling service and fire door installation live exercise (solo), labs 25 - 30
- Promotion to Coiling Door Tech**
- Take sectional and coiling service and fire door exams for IDEA certification

Months 25-36

- Continue working as Garage Door, Sectional Door and Coiling Door Tech
- Complete IDEA Master Technician course
- Complete IDEA's Certified Trainer course
- Assist with training new apprentices
- Evaluate tech's progress and overall performance by senior tech group and VP of Training
- Promotion to Master Overhead Door Tech**



Dan Apple is managing director of The Apple Group LLC, a garage door industry consulting firm located in Bonita Springs, Florida. The firm offers business management coaching, training and new employee recruitment. Dan served as president of Apple Door Systems in Richmond, Virginia, for 33 years. The company grew into a statewide dealership with eight locations. He was the first president of the Institute of Door Dealer Education and Accreditation (IDEA), where he was responsible for creating the industry's first national accreditation program in 1998. Dan also served as a director of the Door & Operator Dealers Association (DODA) and IDA from 1994-1998. For more information, contact him at (239) 494-3505, email at Dan@AppleLLC.net or visit the website at AppleLLC.net.