



## **How to Get Ahead at Work (HVAC & BAS Edition): 10 Practical Moves—By Role**

*Editor's Note: This guide adapts core strategies from Harvard Business School Online's "How to Get Ahead at Work" and incorporates industry-specific insights from SRG Talent, Pew Research, and the Wall Street Journal.*

**Inspired by** Harvard Business School Online's "How to Get Ahead at Work: 10 Effective Strategies," adapted for HVAC & BAS professionals across field, project, sales, operations, and leadership roles.

In our industry, performance is public: first-time-fix rates, commissioning hours, submittal accuracy, close/win ratios, safety, schedules, callbacks --- the scoreboard is visible. The upside is that advancement can be equally visible if you apply the right habits, consistently. Below are ten proven moves (with concrete examples for your teams) that translate the Harvard guidance into HVAC/BAS reality.

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### **1) Be predictably prepared (be the person everyone can depend on)**

Showing up on time, ready, and organized is table stakes, and still one of the fastest ways to stand out. In practice: confirm scope, arrive with the right tools/data, lead crisp stand-ups, end meetings with actions/owners/dates. Consistency builds trust and sets you up for higher-visibility work.

#### **By role (quick hits):**

- **BAS Technicians/Programmers/Engineers:** Bring standard code blocks, current device libraries, and a pre-flight checklist so commissioning starts on time and stays clean.
- **Project Managers/Estimators:** Open every meeting with an agenda; close with a one-minute recap and next steps. It signals control and respect for people's time.
- **Sales Pros/Leaders:** Send a one-page prep brief before customer meetings (objective, stakeholders, hypotheses, open questions). It elevates perception immediately.

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### **2) Bring solutions, not just problems**

Managers promote people who reduce complexity. When you flag an issue, bring one to three viable paths (pros/cons/owner/timeline). It's leadership in a small package and it compounds.

#### **By role:**

- **Service Coordinators/Dispatchers:** When a route collapses, present two viable re-dispatch options with drive times and SLAs. Do not just escalate the crisis.
- **Engineers/Designers:** If a specified controller won't meet sequences, provide alternates with delta-costs and impacts to lead times and I/O counts.
- **Construction Ops Leaders:** When a sub is late, propose a re-sequencing plan and the communication you'll run with the GC to protect the critical path.

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### **3) Protect your manager's time**

Before pulling your boss in, try something (even a rough draft). For non-urgent items, stack them into a single, well-framed sync. This shows initiative and professional judgment.

#### **By role:**

- **Sales Pros:** Batch non-urgent approvals into a Friday "go/no-go" doc with context and your recommendation.



- **Service Ops Leaders:** Replace ad-hoc pings with a daily 10-minute “exceptions” huddle; everything else lives in a running notes doc.
  - **Executive Leaders/GMs:** Model it: publish your “decision window” each week so the organization learns your cadence.
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#### 4) Be low-drag, high-impact (aka: bring a can-do attitude)

A “no drama, just progress” posture is a promotion accelerant. Volunteer smartly, absorb ambiguity, and focus on moving the ball instead of amplifying noise.

##### By role:

- **Project Managers:** Instead of escalating every RFI, drive resolutions with vendors/GCs and present a succinct decision log.
  - **BAS Programmers:** When sequences are fuzzy, propose a draft intent and review it with the engineer to keep commissioning moving.
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#### 5) Make your impact visible (without grandstanding)

Hard work doesn’t always speak for itself; clear communication does. Share concise weekly updates that tie your actions to business outcomes (SLA hits, change-order capture, safety, margin, schedule). If some stakeholders are remote or off-site, structured updates matter even more.

##### By role:

- **Service Coordinators:** A Friday snapshot: calls completed, first-time-fix %, escalations prevented, and customer kudos.
  - **Sales Leaders:** A one-pager mapping pipeline by vertical, probability bands, risk flags, and asks (where you need executive air cover).
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#### 6) Build cross-functional relationships (the right people should know your name)

Advancement often arrives through relationships: leads from sales, design support from engineering, scheduling favors from ops, advocacy from leadership. Be helpful across silos and get known for being easy to work with and quick to respond.

##### By role:

- **Technicians:** Invest in the dispatch desk. Try to answer callbacks with context, make their day easier, and your assignments improve.
  - **Estimators:** Partner with PMs for post-mortems and fold lessons learned into your takeoffs; that loop builds your internal brand.
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#### 7) Quantify and document results

Keep a living “brag file” with numbers that matter: schedule recoveries, cost deltas, change-order wins, retrofit ROI, uptime restored, energy saved, first-time-fix, safety streaks. You’ll use it in 1:1s, performance talks, and promotion cases.

##### By role:

- **Construction Ops Leaders:** Track labor variance vs. baseline and % of tasks completed on time (PPC); that’s promotion gold.



- **Engineers/Designers:** Capture energy models that beat baseline and commissioning hours you eliminated via earlier design clarity.
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### 8) Ask for feedback and a growth path

Direct beats indirect. Use a short script:

“I’m committed to growing here. Which skills or behaviors would make me more valuable this quarter and what projects could I target to prove it?” Managers respond to clarity and initiative; it turns “fairness” debates into development plans.

#### By role:

- **Service Ops Leaders:** Ask for stretch responsibility (e.g., run weekly KPI deck for the region) with a 30-60-90 plan attached.
  - **Sales Pros:** Request a named account in a new vertical paired with a six-step market entry plan and milestone pipeline goals.
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### 9) Keep learning on the tech *and* the business

People who rise fastest blend technical depth with business fluency. Formal training, manufacturer certifications, and micro-courses on finance, leadership, and communication all signal readiness for bigger roles.

#### By role:

- **BAS Programmers/Engineers:** Add product-line certs *and* a module on project finance so you can discuss margin and cash timing.
  - **Executive Leaders/GMs:** Sponsor cross-training so PMs learn estimating, programmers learn PM basics, and sales learns sequences (mobility grows capacity).
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### 10) Prioritize like a pro (excellent at the few > average at the many)

Top performers don’t try to “win” every task; they concentrate effort on the few that matter most to customers, teams, the P&L and they simplify, delegate, or throttle the rest. This reduces burnout and increases impact.

#### By role:

- **PMs/Estimators:** Protect deep-work blocks for schedule control & critical buy-outs; batch email/IM to two windows a day.
  - **Service Coordinators/Dispatchers:** Tier incoming requests by urgency/impact and automate status updates to free time for exceptions.
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### Role Playbooks (copy/paste to leaders by function)

#### BAS Technicians, Programmers & Engineers

- Standardize code blocks and naming; cut commissioning hours through re-use.
- Send a concise daily site note (what was done, issues, tomorrow’s plan).
- Bring tested alternatives when parts/sequences clash (pros/cons/cost/lead time).
- Track first-time-fix %, callbacks avoided, and time-to-resolution.
- Ask for stretch work (complex retrofits) with a readiness checklist.



### **Sales Professionals & Sales Leaders (HVAC & BAS)**

- Pre-brief meetings; post with actions and dates.
- Present solution hypotheses with quantified value; don't escalate raw problems.
- Publish a weekly pipeline health snapshot (by vertical/probability/risk).
- Keep a win-loss file with themes and next experiments.
- Ask for a new vertical/account with a six-step entry plan.

### **Project Managers & Estimators (HVAC & BAS)**

- Agenda → decisions → recap on every touchpoint; respect calendars.
- When scope shifts, show two paths with schedule/cost/supply impacts.
- Maintain a visible decision/RFI log and a weekly “no-surprises” note.
- Track PPC, critical path hits, buy-out delta vs. estimate, approved COs.
- Block time for deep work; batch comms.

### **Engineers & Designers (HVAC & BAS)**

- Pair early with programming to remove ambiguity from sequences.
- Offer alternates with quantified trade-offs when specs miss intent.
- Capture energy deltas vs. baseline; highlight commissioning hours saved.
- Take a short finance/PM module to speak risk, margin, and cash.

### **Service Coordinators & Dispatchers (HVAC & BAS)**

- Use a live board plus a short daily broadcast; save ad-hoc pings for exceptions.
- When a route breaks, present two re-dispatch plans with SLA implications.
- Weekly KPI note: calls, FTFR, escalations prevented, top customer notes.
- Tier requests; automate updates; reserve energy for true exceptions.

### **Service Operations Leaders (HVAC & BAS)**

- Publish the cadence (huddles, metric windows, decision hours).
- Convert noise into systems (exception boards, standard work, playbooks).
- Track labor productivity, SLA performance, callback trends, safety streaks.
- Seek a stretch assignment (regional KPI pack, cross-branch process).

### **Construction Operations Leaders (HVAC & BAS)**

- Be the “low-drag GC partner”: crisp RFIs, proactive resequencing options.
- Push decision logs; protect critical path; measure schedule variance weekly.
- Coach PMs on batching escalations and pre-solving with vendors.

### **Executive Leaders & General Managers (HVAC & BAS)**

- Model time discipline (decision windows, meeting hygiene, deep-work blocks).
- Sponsor cross-training to build bench strength and mobility.
- Ask for “one-page Fridays” from key functions so wins and risks stay visible.
- Coach teams on prioritization (excellent at the few, throttle the rest).

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### **How to roll this out (quietly, effectively)**

1. Pick three moves to pilot for 30 days (e.g., #2, #5, #10). Track before/after.
2. Publish cadences (meeting hygiene, decision windows, update rhythms) so everyone can align.



3. Install brag files: one page per person, updated weekly with wins tied to KPIs.
  4. Coach for visibility without noise: short, regular updates that tie actions to outcomes.
  5. Protect energy: deep-work blocks for high-value tasks; batch comms.
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This article was synthesized using research and frameworks from the following sources:

- **Core Framework:** Harvard Business School Online (“How to Get Ahead at Work”)
- **Industry Adaptations:** [[srgtalent.com](https://srgtalent.com)]
- **Supporting Data & Concepts:** [[wsj.com](https://www.wsj.com)], [[pew.org](https://www.pew.org)], [[dadisfire.com](https://dadisfire.com)], [[upwork.com](https://www.upwork.com)], and [[en.wikipedia.org](https://en.wikipedia.org)]