

## **Confirmation & Verification of Information**

### **Confirmation-Verification visit or call (Formal step in the sales process)**

The Confirmation Visit or (phone call for smaller accounts), should be set up in the First Meeting and be the primary meeting date and time set up as the “Plan of Action”. We ask for the confirmation meeting by stating that we would like to explore all options and discuss the recommendations and performance reports.

“We would like to set up a time to meet with you for about a half hour or so to discuss the options that you will have and any recommendations we come up with. We can discuss money saving opportunities at that time and review any changes to the program that will be presented as final agreement documents.”

“I would like to set up a time to meet with you and anyone else that may have feedback or input related to moving forward with our recommendations. Can we meet next week to discuss our report and explore the options you will have?”

“I’m certain you will have some options, based on the reports that we generate, to review before we move forward and you can help us prioritize these options and I can place the recommendations in a formal document. Can we meet two weeks from today? Is there anyone else that we should include?”

### **Confirmation-Verification Format**

- 1. Original “Plan of Action” as executive summary or cover letter**
- 2. Review Needs, Pains and Goals discussed earlier**
- 3. Equipment List and Photos with any issues from building assessment**
- 4. Recommendations in “bullet” form, use the North Boundary format**
- 5. Financial Justification, ROI with Operating Cost Analysis (or concept)**
- 6. Benefit Statements listed out in ‘bullet’ form**

Keep the documents simple and concise, presented more like a PowerPoint presentation and very informal.

**No price or program cost is written out or no contract documents attached! Verbally discuss the price or cost of the program(s) and “round up” to allow your self the opportunity to negotiate.**

Negotiating price means reviewing your recommendations and only reduce price when something is taken out of the program!

Confirmation & Verification gives you the opportunity to negotiate before taking time to prepare and present formal documents.