

“Your Mechanical” Tele-Prospecting & Appointment Setting Script

Sample Telephone Script:

Hello, my name is ____ I work with _____, have you heard of us? (Yes/No)...We are a facility services contracting company specializing in HVAC. **I'd like to meet with you for about a half hour to learn more about your business, share our successes related energy saving recommendations and if there is a fit we can develop a plan to help you ...is Monday or Tuesday OK to meet, Morning or Afternoon?** Our comprehensive approach includes a systems performance evaluation, building energy optimization recommendations and service maintenance program options. (breathe) I'm calling today to let you know how we've helped others in your area to (use a couple)...add dollars to their bottom line...optimize building MEP (mechanical, electrical, plumbing) systems operations...improve efficiencies...address downtime or productivity issues and protect your investment in the building...take the worry out of maintaining critical portions of your building and control operating costs, including utilities. I'd like to meet with you for about a half hour to discuss your business, our capabilities and a possible plan to help you ...Monday or Tuesday, Morning or Afternoon? Thanks, see you then...

“Your Script”:

- Identify your best few benefits
- Request a half hour meeting
- Stress the importance of their input, their knowledge of the business
- Express desire to understand their business and a possible fit
- Select the day, date and time to meet
- Go back to those best few benefits

Hi, my name is _____, I work with _____, have you heard of us? We are a full service HVAC provider and **I'd like to meet with you for about a half-hour to learn more about your business and facilities, share some of the programs we've been successful implementing to save energy and if there is a fit develop a plan to help you. Do you have a half-hour next week on Tuesday or Wednesday?** We work with building owners and managers (business owners) to help reduce overall costs related to operating and maintaining buildings, as well as, help improve operations of your mechanical, electrical, plumbing and utilities. Our comprehensive approach includes a thorough building survey, HVAC systems performance assessment, building optimization recommendations and service maintenance programs. (breathe) I'm calling today to let you know how we've helped others in your area to (use a couple)...add dollars to their bottom line...optimize building HVAC systems operations...improve efficiencies...protect your investment in the building...we help you concentrate on your core business. I'd like to meet with you for about a half hour to discuss your business, our capabilities and a possible plan to help you ...Monday or Tuesday, Morning or Afternoon? Thanks, see you then...

Your Own Script for Appointment Setting

Use Your 2010 – 2014, Customer List – “non-maintenance” Customers

1. Research calls and personal cold calls (target markets)
2. Appointment Setting (phone, email and personal)
3. Higher level Decision Making Unit – Benefits
4. Financial approach

Introduction & Agenda:

Hi, this is _____ with _____, we are a building solutions provider to help you reduce or control costs related to energy and HVAC operations. **The reason I’m calling is that I would like to meet with you for about a half hour to learn more about your business and facility, share some of our successes in helping building owners and executives save money related to utilities and if it looks like we can help you, we’ll set up a schedule to move forward. Do you have some time Tuesday or Wednesday?** We offer programs to help with the maintenance and operations of the mechanical systems, or HVAC systems. We offer energy services and a planned approach to upgrades or equipment replacement, while helping with comfort or productivity issues. I would like to meet with you to share more information and learn more about your business and operations to see if we can help control costs or save you some money. After our initial meeting I would be pleased to survey your facility and provide a building performance assessment to identify cost cutting opportunities. Do you have time Tuesday or Wednesday? Yes, we typically meet with executives within the business to get you feedback, your input and see if we can help out...

Two Direct Benefit Statements:

We help improve the overall comfort, operations and maintenance of your facility HVAC systems to help eliminate emergencies, reduce breakdowns and extend the useful life of systems.

We also work with you to reduce or control the costs that are directly related to owning and operating a building, saving money on energy and repair costs.

Reason for Meeting: “That’s why I’d like to meet with you...”

The concerns you just mentioned and the fact that we need to know more about your facility and operations are reasons to meet for about a half hour.

“Is that important to you...?”

Capabilities Overview – Write a “Message”

1. HVAC Energy Services –
2. HVAC Equipment Replacement Planning – “Asset management “
3. HVAC Operations and Maintenance Services –
4. Benefits for the Prospect (two are listed above)

“We also offer Controls and automation, energy retrofit work, maintenance, lighting and other recommendations...”

Introductory Questions (initial call and First Structured Visit):

Tell me about your responsibilities and how long you have been with....?

What impact does the facility or HVAC systems have on your job and responsibilities?

What impact do the HVAC, mechanical and electrical systems have on your business, daily routines?

Is this your only facility? Do you folks own the building?

Can you tell me a little about your budget related to owning and operating the facility, have you had major expenditures on the HVAC systems over the last few years?

How do you maintain the systems currently, tell me about that?

What keeps you awake at night when you think about the facility and environmental systems? Tell me more about those concerns?

When? What? How did you resolve? Still an issue?

Well, we certainly would like to offer some energy recommendations and help with the issues you just mentioned, how would any program get approved?

Let’s set up a schedule and I can email you the dates and details of some financial information that we could use to help with our assessment...

What date and time might be appropriate for us to review some options, look at some recommendations and costs for helping you?

DATE to Confirm & Verify: Set the date and time in the First Visit – several days after the survey and after gathering financial data.