

Commercial Service Sales Communication Scripts

“Service Sales Phone and Meeting Communications”

Personal Cold Calls...Request for names and information:

“I’d like to know who to send some information to about our company...I do not have an appointment today, but was nearby...could you tell me who has budget authority over the facility operations? The VP of operations is? The controllers name? The VP of finance? CFO?

Would you have the name or a card of the person who has budget oversight related to the management of the building? ...the executive that has budget responsibilities for facility operations? ...the facilities engineer or manager? ...their email address? We will send some information.

(Calling the Sales, Marketing or Public Relations group in a company)

Hi this is...I’m in sales with “Your HVAC Company” and I was hoping to get some information to the VP of finance or VP of operations...CFO, operations manager or controller?

(Finally)...I have some information I would like to send and could use the correct spelling of their name and how they like to be addressed? Remember: “We help business owners, managers and building managers control costs and effectively manage operations of the HVAC/mechanical systems within any facility. Initially we meet with executives of your company to learn about your top priorities and budget related to the HVAC systems”

Getting Through to the Decision-Maker – Beyond the Gate-Keeper:

“Hi, this is James Graening ..I’d like to speak to Jim Peters. (Use their first name!)

“I work with ‘Your HVAC Company’ and I’m calling regarding some information and a letter (or email) he received...yes, he is expecting my call. I promised him that we would get together to meet.”

We work with business owners and facility managers, CFOs, VPs of Finance (leaders in organizations) to help them manage facility operations and control costs related to the HVAC, mechanical systems and controls.

We typically work with leaders, executives and managers in order to understand specific business needs related to the facility operations and not waste anyone’s time if there is no interest. We would like to learn more about you, your business and facility.”

Reaching the Decision-Maker:

“Your (Mr./Ms. CFO or VP Finance) input or feed-back related to our programs will help us determine how we can best help you out. We have many programs that have a direct impact on budgets and utilities related to building operations, you know your business the best and the financial impact

building systems can have...you also know business concerns that may exist. We will help reduce emergency situations and costly surprises!

I'm just looking for a half hour of your time to see if there is a fit between 'Your HVAC Company' and your business. How about next Tuesday or Wednesday, 9:00 AM?"

HVAC Service Sales Scripting, "The Agenda" – Core Steps

Setting Structured Appointments:

"We would like to meet with you for about a half hour to learn more about your business, about your responsibilities and the facility. We would also like to share information about how we can improve cash flow within your business, or improve the overall environmental (HVAC) condition of the building related to the mechanical systems. If it looks like we can help you or if there is a fit, we can set up a plan to move forward at the end of the meeting...do you have a half hour next Tuesday or Wednesday? AM or PM?"

The First Structured Meeting:

"Thank you for taking the time to meet with me today. As mentioned in the email that I sent and our recent phone call; we would like to learn much more about your business, learn about your responsibilities and of course the operations of the facilities. I would like to discuss how we've helped other businesses and facilities managers to improve the overall environmental condition of the building as well as improve cash flow within the business. At the conclusion of today's meeting, we can set a plan to move forward and set aside specific times and dates, how does that sound?"

Financial Justification – Collecting Information:

"We would like to perform a building assessment with a physical survey; making an equipment list and gathering some financial information. We "follow the money trail" and can help reduce or control costs related to the building's environmental systems. In many cases we help improve cash flow within the business. We typically compare your costs with other buildings of similar size and usage; we collect financial information from three main categories, annual costs:

"Energy and utility usage, Major component repair or replacement costs, Outsourced services costs, labor costs"

Confirmation – Verification Meeting:

"Thank you for partnering with us to provide financial information and access to the building for our Building Assessment. Today we would like to discuss your current expenses related to the facility HVAC, look at some photos of your HVAC systems and discuss the equipment list. We also have some options for you and would appreciate your input and feedback on how to proceed and prioritize these recommendations. We also will discuss the financial justification for this work and at the close of the meeting we can set up a time to get the agreement documents signed off on."