

## Simple Concepts for Setting Appointments – “Scripting”

### The Agenda:

“We would like to **LEARN** more about your business, responsibilities, facility and HVAC budget in order to help you.”

“I would like to **SHARE** information about how we have helped building owners and managers improve cash flow within their business, or save money related to HVAC.”

“**IF** there is a fit, or we see that we can help you, we will set up a plan (or schedule) to move forward...”

“Do you have time next Tuesday or Wednesday?” “9:00 or 10:00 AM?”

### Primary Benefit Statements

What?

“We help facility owners and managers save money or **improve cash flow** within their business by reducing operating, maintenance and repair costs...”

“...as well as **improve the overall environmental health of the building** related to HVAC, comfort and indoor air quality.”

### The “Big 4” Approach

How?

“By **resolving issues and solving problems** related to the HVAC systems, long-standing concerns that you may have about your equipment and systems”

By reviewing and helping **design true, planned preventive maintenance** programs...the number one cost saving opportunity in any building”

“By looking for **low cost or no cost energy savings** opportunities and the associated recommendations...”

“By helping your business with **capital expense planning**, or helping with equipment replacement planning strategies.”

Notes:

## The Telephone Script:

Use a telephone script and use role playing to take your script from a script to an outline to just bullet points. Work with the sample script to stay focused on your task of getting that first visit, but, try not to sound like a telemarketing robot!

Your script should be:

- Simple In Content
- Cover Who You Are
- What Company You Represent
- Why Your Calling... Visit, Interest, Help & Benefits of Building Optimization
- Ask For The Appointment, Half Hour Of Time – KEEP ASKING
- Set Time, Date, Confirm, Thanks, BYE!

## The Cold Call Approach:

When making personal visit cold calls, get decision makers names, titles, maintenance info and ask to speak with any of these people to set a future appointment. Leave your card and capabilities overview & approach.

## Who to See & Why:

Decision Makers: VP Finance, Owners, President, CEO, CFO, Controller, etc.  
Building Operations sponsors: Managers, Building Supervisors, Business and Office Managers; see or contact these titles first to not get "blocked" by the facilities personnel.

## Sample Telephone Script:

Hello, my name is \_\_\_\_ I work with \_\_\_\_\_, have you heard of us? (Yes/No)...The reason for my call is I'd like to meet with you for about a half hour to **Learn** more about your business and responsibilities, **Share** information about our successes, how we've helped improve cash flow in businesses just like yours, and **if there is a fit we will set up a plan to help you. Do you have a half hour next Tuesday or Wednesday?** We offer unique solutions to help control costs and improve comfort (productivity, efficiencies, air quality) related to your environmental systems. We are an HVACR & mechanical services contractor. There are many programs, products and services that we offer building and business owners regarding your Heating Ventilating, Air Conditioning and environmental control...(go to the end?) Our thorough approach includes a building performance assessment, review of operating costs and presenting service maintenance programs. (breathe) I'm calling today to let you know how we've helped others in your area to save money or improve operations (use a couple)...we help improve the overall environmental condition of your building and control or reduce costs, all related to the HVACR...optimize your building HVACR systems' maintenance and operations...improve comfort...address downtime or productivity issues and protect your investment in the HVAC systems...take the worry out of maintaining that portion of your building and control operating costs, including utilities. **We really feel that we can help**, so just a half hour? 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? 2:00 PM or 3:00 PM? Thanks, see you then...