

**Booking a Virtual Sales Consultation**

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**Booking a New System Appointment**

* Thank you for calling the (Company).
* My Name is \_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ how can I Help You?
  + (Listen intently)

**I want a price for a new system**

* What’s going on? (Get them Talking)
* Tell me about that
* (Empathize) Sorry you’re having that experience.
* We can help.
* Just need some information then we can look at the schedule.

**Capture or Verify your**

**(Customers Information)**

* What is the best phone number to reach you?
* Are you the home Owner?
* First and Last name?
* Address?
* E Mail?
* How old is your system?
* How did you hear about us?

**Three Things make up the Price**

**Three things make up the price:**

**1. The Proper System Insuring**

* **Efficiency**
* **Safety**
* **Comfort**

**2. Any additional work necessary for**

* **Code Compliance**
* **Proper Operation**
* **Safety**

**3. Determining what system features make sense for you.**

**Most of the time systems range from ($95 - $185) per month**

**Give them the Options**

**On Site Home Analysis (Agenda)**

**or**

**Virtual Home Analysis (Agenda)**

**I have (Comfort Advisor) available at**

**(Offer a few times and dates). Our customers really like (Name), (She/he) will do a great job for you.**

**We can either schedule (CA) to your home for a Home evaluation making sure the system is sized correctly, verify its Code Compliant then, help you design your new system.**

**This will take about 60 to 90 minutes.**

**Or we can do this Virtually as long as you’re comfortable connecting on line: (Very Similar to a “Tele – Doc” consultation).**

**The Virtual consultation normally takes about 30 to 45 minutes**

**Which would you prefer?**

**On Site Agenda**

* **Earlier, we reviewed a few dates and times. What works Best?**
* **Will anyone else interested in the system and price be joining us?**
* **I’ll send you some information in preparation for the visit. Would you prefer text or email?**
* **Is there anything else I can help you with while I have you on the phone?**
* **(Comfort Advisor) will be reaching out to you soon by (text – e mail – phone).**
* **Thank you for calling. My name is ---------. If you have any questions or concerns, feel free to call me anytime. I’ll forward you my contact information with the (text or email)**
* **(If they say “Thank You, Reply “My Pleasure”.**

**Virtual Sales Consultation Agenda**

**Great,**

**Just need a little more information.**

**Have you ever used any on line programs like Face Time or Zoom to interact with people?**

* **Ok, Ill e-mail an invitation for your virtual meeting.**
* **Looks like (CA) can connect with you (time & date range) what date and time works best for you?**

***Confirm Consultation date and time. Verify receipt of invitation***

**We may need to see a few details about your existing system to make sure everything is code compliant and compatible for a new system. Are you physically able and willing to help with that?**

**Homeowner NOT physically able or willing to help**

**We can still perform 70% of the process online then pop by for a quick 15 or 20-minute Home evaluation if necessary.**

**I’ll make a note about that for (CA)**

**(CA) will be contacting you shortly by text or e-mail.**

**You should have received your link for the online Consultation. Our contact information is included.**

**Is there anything else I can help you with**

* **While I have you on the phone?**
* **While we are chatting on line?**

**It’s been pleasure meeting you.**

**All the Best and Take Care.**

**Homeowner IS willing to help**

**“Involve Them In The Process”**

**Great,**

**We can send you a list of photographs we need ahead of time so you can email them to (CA) me before your consultation**

**Or**

**We can e-mail an additional zoom link accessible from a pad or phone so you can be our eyes and ears during your consultation.**

**What works best for you?**

**If there is anything on that list of photographs you either don't have access to, uncomfortable with or don't know where to find some items, we can address it during our consultation.**

**Homeowner IS willing to help**

**“Set the Agenda”**

**Ill send you a quick (text or e-mail) with a list of photos and where to send them along with your link for the online Consultation. Our contact information is included.**

**Is there anything else I can help you with while I have you on the (Phone, Chat, Email…?)**

**It’s been pleasure meeting you.**

**All the Best and Take Care.**

**How much is a new system?**

**Depends upon three things**

* **The size you home needs**
* **The system features you want**
* **And Additional work necessary for safe operation - Code standards and performance.**

**Once we finish the evaluation, they will review all options until you are comfortable with the price.**

**Most of the time the price ranges from $95.00 to $185.00**

**Per month**

**Just give me some sort of a ballpark price!**

**I can help you with that; …**

* **If I can have your address, I will perform a virtual analysis of your home to determine what size of system you will likely need.**
* **Then we could connect online to review the different system features available**
* **Once you have an idea of what you want, we can build a few systems together until we find one that makes sense.**

**It will take me about 30 minutes to spec out everything we need to establish some price points.**

**The monthly payments usually average $95 - $180 per month depending on the size your home needs, code compliance and the type of system you want.**

**What measures can you take to reduce stress?**

* Don’t Worry about things you have no control of
* Set Goals
* Finish Unfinished Business
* Resolve Conflicts
* Take Care of yourself
* MINDSET

Irate Customers

* Never Blame the Customer
* Avoid Criticizing
* Maintain Self Control
* Put them in Control of the situation
* Follow Through