

Satisfy the  
Important Urgent  
Request

Perform a  
Risk Assessment

Draw attention to  
One or two Important  
Non Urgent Options

Be Prepared  
Park in the right spot  
Look Sharp - Be Sharp  
Knock on door

- Business Card
- Photo ID
- Floor Savers

Ask for purpose of call  
Listen to understand  
Write down what they want  
Repeat what they said

Set the Agenda

- What you will need to do
- Time Commitment
- Access to the home
- Options to review

Evaluate the system

Prepare your options

Re engage your Customer

(Demand Service)

Explain what it will take to  
Restore operation and  
any pre-emptive repairs

(Maintenance or Tune up's)

Review system operation  
any pre-emptive repairs  
And any relevant accessories

Age of system

Average Life of System

Warranty status

Probability of Future issues

*Recommend one or two  
Non Urgent solutions*

Maintenance Agreement

*Relevant Accessories*

*Additional Work*

*System Upgrade*

*Clarity Program*