

Technician Soft Skills

Objectives

- Understand how you should professionally approach a customer
- Understand how you can effectively offer enhancement opportunities to the customer

How to Successfully Approach a Customer

Introduction

Make the customer feel comfortable



Help ease tensions



Relieve any fears



Build good customer relationships



How to Successfully Approach a Customer

Before Arriving at the Home

- Stop in a parking lot to prepare
- Check your physical appearance
 - Is your uniform clean?
 - How's your hair?
 - Is your shirt tucked in?
 - Are your shoes clean?
 - A mint or shot of mouthwash wouldn't hurt...
 - A shot of deodorant may be in order...
 - Take that last puff...

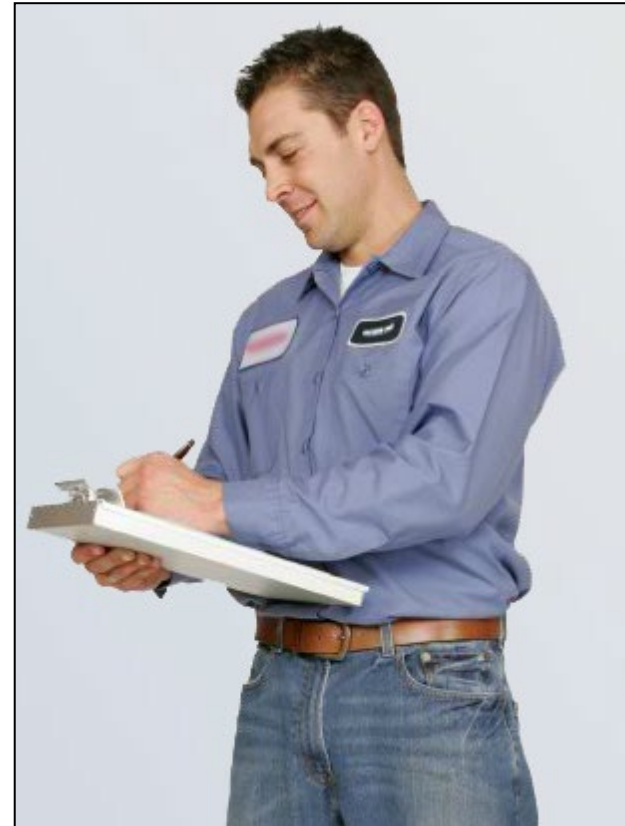


How to Successfully Approach a Customer

Get Your Paperwork Ready

Customer name and
address on invoice

Business Card



How to Successfully Approach a Customer

Arriving at the Home

- Determine the best place to park
 - Maximum advertising effect
 - Normal parking spot
 - Doesn't block the customer's vehicles
- If your truck leaks oil, put cardboard under the engine
- Go promptly to the door and knock
 - Only your clipboard and business card
 - Knock – don't ring the doorbell
 - Step back from the door



How to Successfully Approach a Customer

Communicate with the Customer

- Be courteous
- Show respect for the customer and their property
- Have a pleasant greeting



"Hi, I'm Steve, from ABC Heating & Cooling"



How to Successfully Approach a Customer

Communicate with the Customer

- Verify the appointment
- State why you are there
- Make sure you are talking to the customer



"I believe you requested a performance tune-up today. Are you Mrs. Jones?"

How to Successfully Approach a Customer

Communicate with the Customer

- If the person who answered the door is not the customer, start over when the customer comes to the door
- Don't walk past the customer
- Ask permission & have the customer show you where to go



How to Successfully Approach a Customer

Start Building Rapport



"I'll put on my floor savers just in case my shoes have any dirt on them. I don't want to track anything into your home."



"You've got a really nice lawn. It looks like you've worked hard on it."

Compliments can help build rapport

Don't over-do it

An insincere or exaggerated compliment can backfire

Avoid personal compliments

How to Successfully Approach a Customer

Gain Approval to Perform the Job



"I'd like to start by seeing the thermostat. Then in a couple minutes, I'll need to see the indoor and outdoor units."

Let the customer know where you need to be in their home

Ask what access routes they would like you to use

Ask the customer where they will be when you need to advise them of progress



How to Successfully Approach a Customer

Summary

- Be polite
- Attempt to understand problems from the customer's point of view
- Be conscious of body language



How to Successfully Approach a Customer

Summary



Appropriate dress & professional appearance

Knowledgeable, polite, & patient

Respectful of customer's home & property

Performs work neatly & leaves all areas clean

Educates customer on enhancement opportunities – without a high-pressure sales pitch

Technician Selling Skills

Introduction

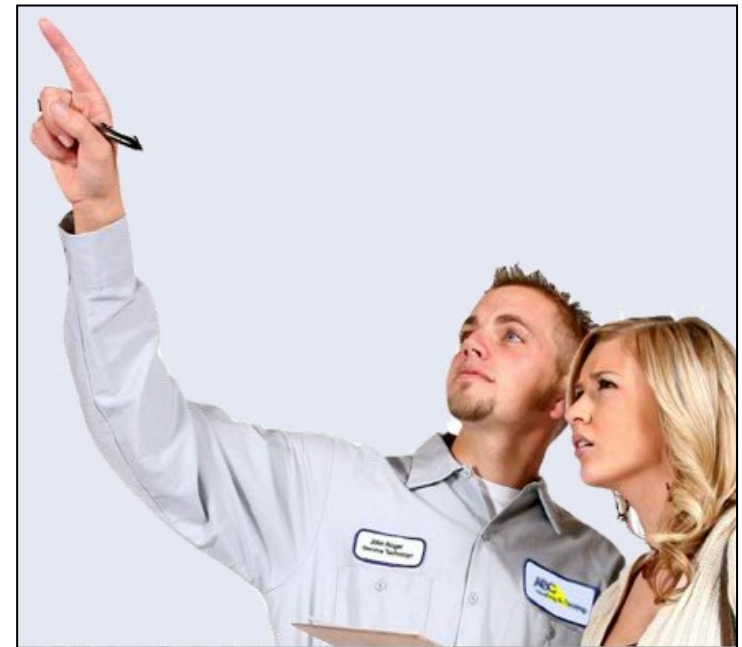
- Knowing when and how to apply basic sales skills can help you be at the top of your game
- Technicians play a critical role in how a company builds relationship with customers
- Enhancement opportunities benefit the customer



Technician Selling Skills

The Right Kind of Sales Approach

- See yourself as a consultant
- A consultant:
 - Believes they need to know what they are selling before they sell it
 - Believes that sales is something you do **for** someone, not **to** them
 - Doesn't attempt to make buying decisions for the customer
 - Goes to a service call with the attitude of: "What can I do for you?"
 - Always plants seeds for tomorrow



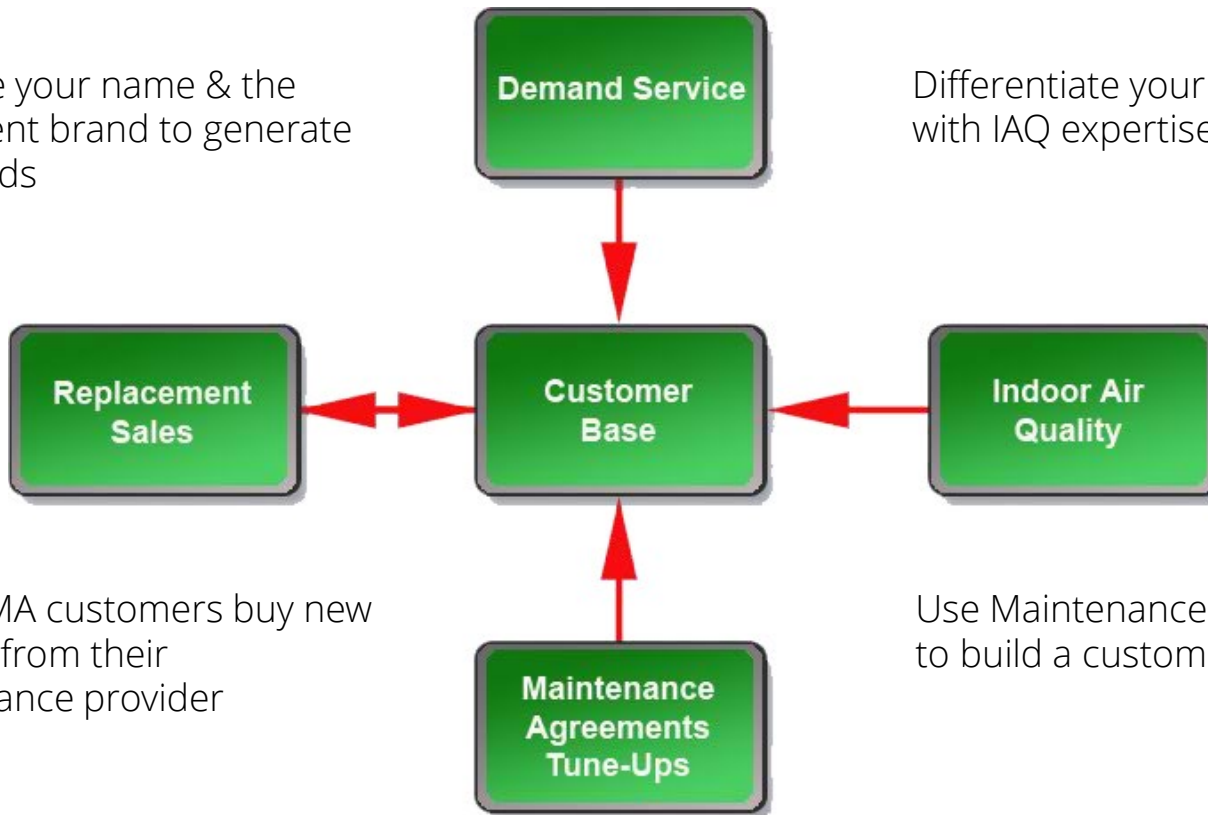
Technician Selling Skills

Maintenance Agreements

HVAC Business Model

Leverage your name & the equipment brand to generate sales leads

Differentiate your company with IAQ expertise



86% of MA customers buy new systems from their maintenance provider

Use Maintenance Agreements to build a customer base

Technician Selling Skills

Maintenance Agreements

- For the customer, a maintenance agreement means:



- Peace of mind – equipment will be serviced and maintained by a qualified, trained professional
- Equipment will be working at peak efficiency
- Repair costs are reduced (or included) in the Agreement price
- They get priority service (benefits depend on the MA you offer)
- They have a service company they can call, rely on, and trust

Bottom line: leaving the customer
WORRY-FREE

Technician Selling Skills

When and How Should You Sell a Maintenance Agreement?

- Mention it when you present your findings & recommendations to the customer
- Offer the best available plan first – you can always “step down”



Technician Selling Skills

Note: This may be modified to reflect offered MAs

When and How Should You Sell a Maintenance Agreement?

"Ms. Moore, would you be interested in learning how you could save 15% on the cost of these repairs? These are the Priority prices for our maintenance agreement customers."



Urgent Repairs	Standard	Priority
Diagnostic	\$ 74	\$ 63
Condensor fan motor	\$ 290	\$ 247
5 UF run capacitor	\$ 57	\$ 48
Precision tune-up	\$ 89	
	Total: \$ 510	
		Maint Agmt \$ 189
		Total: \$ 547

Note: This may be modified to reflect offered MAs

Technician Selling Skills

When and How Should You Sell a Maintenance Agreement?

"Included in the investment of your Priority Maintenance Agreement, we will do a tune-up of your system today. In addition, you will receive two more tune-up calls over the next year. This would normally cost \$178 for the two visits.

"Also with the Maintenance Agreement, you will never pay an overtime fee and you will continue to receive 15% off on future parts if needed. All for only \$37 more than your urgent repairs today. If you'd like, we can start saving money right now by performing the first of three maintenance calls, while I also do the repairs that are needed on your system."



Technician Selling Skills

Additional Suggestions for MA Introduction

What are some other ways to word your introduction to the Maintenance Agreement?



Technician Selling Skills

Note: This may be deleted or modified depending on what kind of MAs are offered

Interested in the MA but Concerned about the Cost?

- What if the customer shows interest but expresses concern about the cost of the MA even after you have explained the long-term savings?
 - If you offer several levels of agreements, offer the next best plan.



"If you're not sure about the Priority Agreement, we also have a Preferred Maintenance Agreement that would save you 10% on today's repairs."

Remember: Always let the customer decide!



Technician Selling Skills

Maintenance Agreements

Reminder:

Know your product!



Technician Selling Skills

Maintenance Agreements

If the MA covers tune-ups, perform the first one now (or schedule it).



Technician Selling Skills

IAQ Accessories

- Today's consumers are more:
 - Health conscious
 - Knowledgeable and demanding
 - Concerned about the air quality in their homes
- You have a unique opportunity to identify IAQ issues



Technician Selling Skills

IAQ Accessories

- What you can do **for** the customer
- Presenting yourself and your company as someone the customer can trust



Technician Selling Skills

IAQ Accessories – Educate Yourself

- First:
 - Understand IAQ issues
 - Be familiar with the products
- Educate Yourself



Technician Selling Skills

Turning a Service Visit into an Opportunity to Offer IAQ Solutions

- Be on the lookout for signs of possible IAQ problems in the home
- Examples:
 - Pet odors
 - Noticeable dry air
 - Noticeable humidity
 - Lingering cooking odors



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IAQ Issues – Example

“Mrs. Jones, does anyone in the home get sinus infections or have dry sinuses?”



Technician Selling Skills

IAQ Issues - Approaching the Customer

- Step 1: Educate the Customer
 - Types of contaminants found in a home
 - Impact of IAQ on health, comfort, cleanliness
 - Strategies for improving indoor air
 - Role IAQ plays in complete, continuous indoor comfort



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IAQ Issues – Educating the Customer – Example 1

“Mr. Smith, does anyone in the house suffer from pet allergies or have asthma?”



Technician Selling Skills

IAQ Issues – Educating the Customer – Example 2

“Ms. Garcia, are you aware of the mildew on your registers? These conditions are ideal for contaminant growth.”



Technician Selling Skills

IAQ Issues - Approaching the Customer

- Step 2: Conduct Home Assessment



Technician Selling Skills

IAQ Issues - Approaching the Customer

- Step 2: Conduct Home Assessment

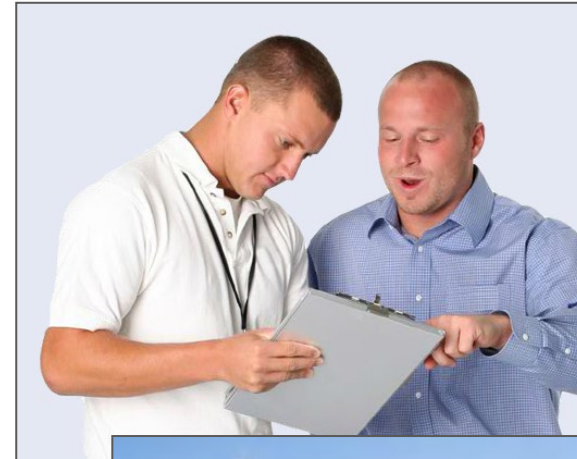
"If you'd like, I could do a thorough air quality assessment of your home to see if there are any other areas where we might be able to help you."



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IAQ Issues - Approaching the Customer

- Step 2: Conduct Home Assessment
 - Go through a home assessment survey
 - Inspect the home from an IAQ perspective
 - Look at existing HVAC system:
 - Age of equipment
 - Efficiency rating of equipment
 - Duct leakage
 - Any accessories (filtration, upgraded thermostats, etc.)



Technician Selling Skills

IAQ Issues - Approaching the Customer

- Step 3: Determine the Right Solutions & Present Recommendations

Best

Better

Good

When presenting recommendations – Don't forget Maintenance Agreements

Technician Selling Skills

Repair vs. Replacement

- Do a Cost Comparison
 - Cost of ownership of existing system for next 5 years
 - Compare to a higher efficiency unit
- Costs to keep the current system running are typically well over \$1,000



Repair +
Ownership

VS.



New System

Technician Selling Skills

Repair vs. Replacement

Other issues to consider...

- Does existing unit contain R-22?
- Is any warranty left on the existing unit?
- Is the existing unit over 10 years old?



Technician Selling Skills

Repair vs. Replacement

Review homeowner's comfort level and any existing IAQ issues

- 2 stage cooling systems run longer on lower stage / dehumidify better than single stage
- 2 stage cooling systems provide even temperatures with fewer start-stops
- 2 stage gas heating provides a more constant temperature / longer period to add humidity
- Variable speed motors are quieter / allow for better IAQ filtration
- Across the country, duct work in homes is in poor condition



Technician Selling Skills

Repair vs. Replacement

Go over your findings with the customer

- Remember, it's not your job to decide for the customer
- Ask if a comfort advisor can come by to discuss replacement options

