

The Presale Phone Call

SAMPLE SCRIPT – HVAC

Closing the sale with financing starts early — even before you meet consumers face to face. Here’s an example of an appointment-setting presales phone call. In this case, you are Sam, the sales representative for ABC Heating and Air. You’re talking with Mike, a potential consumer who requested more information. Use this as a starting point and customize with your own information. Remember, the call should set expectations for the in-home visit, including time expectations and the expectation that you will present special financing options.



SAMPLE SCRIPT

You: Good evening, this is Sam. Is this Mike Jones?

(Consumer answers “yes”)

You: Hi Mike, I’m with ABC Heating and Air and I’m calling because you requested information and pricing and I want to make sure we have the information you need. Do you mind if I ask a few background questions?

(Consumer gives OK)

You: Great.

You: *(These are recommended questions.)*

What type of system do you have now?

What kind of problem are you having with your system? How old is it?

What’s the age of the home? Do you know the year your home was built?

When is the last time you had your system serviced?

(Consumer replies to each question.)

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SAMPLE SCRIPT (CONT.)

You: Could we see your existing system in order to know what needs to be done? That way we can get a better idea of whether we can do what you want. We'll show you all the different options you can have and we'll show you exactly how a new system would perform and how it would be installed... plus, we'll give you an exact price, including special financing options that might be available subject to credit approval. Does that sound helpful?

(Consumer says "yes")

[You've now taken the first step toward offering a special financing option and set the expectation that the consumer will hear more about it during the in-home presentation.]

You: That's great, Mike. The goal of this visit will be to discuss all your options and answer all your questions. Fair enough?

(Consumer agrees)

You: So then, what's the address of the property?

(Consumer provides address)

You: Great, let's set aside about 60 minutes and within that time we'll make sure to answer all of your questions. We would need to meet with all the owners of the property or anyone who would be making decisions on the project for your home, other than yourself. Who else will we be meeting with?

(Consumer provides name and/or relationship)

You: What's the best time to catch you at home? Afternoons or evenings?

(Consumer provides time)

You: We'll see you then!