Technician Communication

Indoor Air Quality Selling Process

What’s Your IAQ F.O.C.U.S.?

A Five (5) Step Process To IAQ Success On Maintenance And Service Calls.

Before we get into the communication process for IAQ on a service or maintenance call, I’d like to set the stage with a simple definition of sales. There are many excellent books, videos and presentations about sales, the art of sales, closing the sale, the psychology of selling, sales processes, etc. yet most technicians did not become technicians to “sell”.

They may not read these books or watch these videos because they have no primary interest in selling; they just prefer to fix things. And by the way there is nothing wrong with that. I’m not saying that there aren’t any rock star selling techs out there. I know there are because I have met them over the 25 plus years that I have been training technicians. Yet, people hate to be “sold” and the vast majority of technicians dislike the idea of selling and just want to fix things and give great service.

**So, how do we give them both what they want?**

Well let’s start with this basic premise about sales:

*“Sales is the transfer of your belief to someone else and the reward is money!”*

This statement makes a few assumptions.

1. You believe in your product and/or service.
2. You understand how to communicate this belief to someone else.
3. You are compensated for doing so.

If you’re anything like me you would find it very difficult, if not impossible, to sell something that you didn’t believe in or understand.

Technicians for the most part want to understand technically how something works and performs before they will even discuss it with a homeowner. That’s why we do IAQ Technical training. In a nut shell, our technical IAQ training covers in depth the three phases of indoor air contaminants, how Mother Nature controls these three phases outdoors, why they are more of a challenge indoors and the technology that is available to solve these challenges in a similar way that Mother Nature does.

They will get a good thorough understanding of IAQ in the form of technology, product offering and solutions. What we don’t want is for them to suffer from Analysis Paralysis!

Secondly, technicians need to learn how and when to transfer this new-found belief system in IAQ products to the homeowner on every service and maintenance call. They must take this technical information and put it into layman’s terms for the homeowner. Getting too technical with a homeowner may confuse them about the issue at hand. And a confused consumer usually doesn’t buy.

Also, the timing has to be right when communicating IAQ challenges on a call. Technicians have to earn the right by building awareness and value during the call. Trying to discuss IAQ challenges and solution up front at the beginning of the call is bad timing because you have to take care of the reason for the call first before you earn the right to discuss IAQ challenges and solutions. No heat, no cool, maintenance… That’s why you got the call. So, take care of the task at hand first. Presenting IAQ challenges and solutions before resolving their HVAC challenge is bad timing!

Two quick examples and you decide which is best:

1. Tech:

**“HI Mrs. Jones… Before I get started figuring out what is wrong with your system I have a UV light here for $800, do you want to buy one???”**

1. Tech:

**“I’m finished fixing your system and it is up and running. At the bottom of the invoice here I have listed an air cleaner for $1,800. Call us if you are interested in one.”**

The answer to which process is better is NONE OF THE ABOVE. In neither case has an IAQ challenge been discovered to even give a reason for a product solution. Nor has the homeowner been given more than one option for a problem that they don’t even know exist.

**So, what is the best time to communicate IAQ challenges and solutions?**

During our Technician Communication & Selling Workshop a process of working the call – It is embedded in “The Perfect Service Call Approach”. It is established so I won’t cover it in detail here in this article.

Yet from curb to collect there is a basic anatomy of a service and maintenance call which includes the **diagnostic stage**. This is the ideal time to communicate IAQ challenges and solutions which I will explain in our 5 Step F.O.C.U.S. process for IAQ communications.

Lastly, the third assumption in our basic sales premise:

“Sales is the transfer of your belief to someone else and **the reward is money**!”

The assumption here is that you are properly compensating your technicians for getting homeowners happily involved in IAQ product solutions. We can discuss what that looks like in the tech compensation systems materials, and there is a wide range of ideas here that work.

IAQ sales are an excellent way to increase average tickets, revenue and gross profit dollars, yet it is also an awesome retention tool for technicians.

We all know the expense of getting and keeping good technicians, so we should motivate them and create a culture that rewards them better than any of your competitors are willing to do.



This is a culture of service that compensates them for doing the right thing. The key to your success here is training technicians on the importance of building value for IAQ solutions to protect the equipment and help the homeowner and compensating them for doing so.

When pricing your IAQ products I would allow for a 10% - 15% commission to the technician for IAQ sales and set realistic Key Performance Indicators (KPIs). So, when a technician comes to you saying “I need to make more money or I’m leaving”, you can go right to his IAQ KPIs and your measurement feedback system to review with him where he stands.

In fact, a daily huddle is the review process so there should always be a discussion of opportunities.

If the technician is falling way short, then more IAQ communication training is in order. You see when they understand that they are being held accountable to do certain standards that help the homeowner with solutions that create revenue; their income is in their control and not yours. The technician then becomes the problem and the solution. Yet, you must supply them with the training to get them there.

Now that we have a better understanding of the technical aspects of believing in IAQ products, the importance of communicating in layman’s terms and technician compensation, let’s get into how to PLAN and FOCUS on IAQ on EVERY service and maintenance call.

First the **P.L.A.N.** Have you ever been involved in planning a vacation? Of course you have. How long did it take? What was involved?

* What days can you go?
* Where are you going?
* Who’s going to watch the dog?
* Get the mail and newspaper?
* Lights on a timer?
* What to pack?
* Flights times and airlines?
* Activities?
* Restaurants?
* Hotels?

Technician may spend weeks or months planning a vacation, yet most of them don’t have a plan to work a service and maintenance call in a way that will allow them to produce the income that enables them to afford this vacation!

A solid **P.L.A.N.**

* Prepare
* Learn
* Adjust
* Never quit

In the vacation example there is a lot of preparation involved. Then once we go on the vacation we learn what we liked about it and what we didn’t like. Then we adjust the plan for next time to make it an even better experience. And even if we had a bad experience we never quit going on vacations we learn and adjust.

Same thing should be happening in our P.L.A.N. for the service and maintenance call regarding IAQ communications.

**Prepare for the call.**

* Technical training?
* Dressed right? Clean, nice and neat?
* Right tools and truck stock?
* Good attitude?

**Learn what to do that creates success.**

* Where to park and why?
* Anatomy of a service and maintenance call? Curb to Collect…
* Meet and greet the homeowner with a great attitude.
* Set the stage and expectations with a conversation at the thermostat.
* Proper Diagnostic / maintenance process and procedures.
* What to say?
* When to say it?
* How to say it?
* Why you’re saying it in the first place?

**Adjust based on what’s working and what’s not.**

* Are you achieving the desired results and meeting KPIs?
* Change it up if need be to make the call experience even better.
* See what’s working for others and implement.

**Never quit.**

* Just because you heard a few no’s doesn’t mean you will never hear a yes.
* The numbers are with you – Every time, every call increases your opportunity for success.
* Always review your plan for improvement.
* Practice and role play with your peers.

Many times we over complicate the IAQ communication process and confuse the technician, who in turn confuses the homeowner. And once again a confused consumer doesn’t buy.

When I ask the question to technicians during training “Has a homeowner ever said to you – ‘Every time you come here you’re always trying to sell me something…’?” Most of the hands go up with a resounding yes. I tell them – “That’s because you’re ALWAYS TRYING TO SELL THEM SOMETHING!”

So, let’s quit selling and get people to love to buy from us. Maybe easier said than done, yet follow me here.

In the two examples given above where a technicians brings up IAQ products too soon or too late during the call, the reason people aren’t buying in those scenarios is because the price way out paced the perceived value, since there was no true consumer understanding or value built.

Let’s simplify IAQ communications with the 5 Step F.O.C.U.S. process. (As you can see I love acronyms, especially when they fit the subject at hand!)

**How is your IAQ F.O.C.U.S.?**

**F – Foundation**

**O – Observation**

**C – Communication**

**U – Understanding**

**S – Solutions**

In our IAQ communication class we teach the technician when, where and how to bring up IAQ in casual conversation with the homeowner without complicating the issue. So here we go!

Technicians need an IAQ foundation to build their belief system.

**Foundation assumption.**

* The technician has gone through IAQ Technical training and believes in the challenges and product solutions.
* The technician has an understanding of IAQ challenges in a home and why they exist.
* The technician understands properly designed IAQ products are the solution.
* The technician must set the stage with a conversation at the thermostat.

**Observations**

* The technician must learn what observations (discoveries) to make on a call as far as identifying the three phases of indoor air contamination.
* The technician needs a solid understanding of how these three phases of indoor air contamination affect the performance of the equipment and the health of a family.

**Communications**

* The technician must transfer with enthusiasm his belief in IAQ products
* The technician must understand how and when to communicate these observations and challenges that have been discovered.
* The technician should communicate with visual observations and be able to relate the IAQ challenges and issues related to these observations.

**Understanding**

* The technician must be empathetic with the homeowner regarding the initial reason for the call before ever discussing IAQ challenges and solutions.
* They must take care of the diagnostic or maintenance first, and then announce discoveries.
* Understand when, where, why, and how to communicate IAQ challenges and solutions in layman’s terms during the diagnostic/maintenance stage of the call.

**Solutions**

* You need to have the product solution ready and available to present to the homeowner.
* Have bundled IAQ packages.
* Let the homeowner choose which one best fits their budget and needs.

“Hey, I thought you said this was simple?!” OK, here we go. Let’s plug this into the anatomy of the service/maintenance call.

1. **Foundation – Setting the stage:**

After the meet and greet the technician will ask: “Can you lead me to the thermostat?” It is important that the homeowner accompany the technician to the thermostat so a discovery conversation can be had. After asking questions about equipment concerns and clarifying the reason for the call the technician will ask this simple question: “While I’m here today, and at no extra charge to you, I’m going to do a thorough inspection of you system and if I discover anything that affects the performance of the equipment or the health of your family would you like me to share that with you or just go ahead and take care of it?” I have heard this question asked many different ways so the technician just needs to get comfortable with what works for her and her personality.

The main point of this question is to get permission from the homeowner to do the inspection and bring up concerns. And as you can see there is no wrong answer. They will either reply with “go ahead and fix it” or “I’d rather you bring it to my attention before you do anything.”

1. **Observations – Discoveries:**

During the diagnostic or maintenance the technician will observe dirt, dust and debris in the system along with possible worn parts and pieces like pitted contactors and capacitors out of acceptable range.

As far as IAQ goes the technician will use a camera, video or baby wipe to show the homeowner the dirt in the system. If the homeowner is not already looking over the technician’s shoulder, the technician will call the homeowner to the scene so that they can observe the same thing. “Hey Tom and Sally do you have a minute to check something out with me? Remember when I asked you if I discovered anything that “affects the performance of your equipment” or “your family’s health” and you said you wanted me to share that with you? Well let’s take a look at this here…”

1. **Communications – Show and tell - Transition question to introduce better filters and air cleaners:** “You see this buildup of dirt and dust in here? Well this passed right through your filter and is affecting the equipment’s performance and studies show that it may be causing you to overpay the utility company, may cause unnecessary breakdowns and shorten the life of your unit. I can take care of this today, yet is there any reason why you wouldn’t want a better filter or a proper air cleaner to prevent this from happening in the future?” (I’ll address “it depends what it cost” in a bit.)

**Transition question for UVC:** “Studies also show that this same stuff that is affecting the performance of your equipment can also aggravate asthma and allergies. Who in your house suffers from asthma or allergies? (Homeowner usually replies with a name.) What are you doing to disinfect your air of germs and bacteria to help prevent any aggravation of his symptoms? (Homeowner usually replies with ‘Lysol’ or ‘disinfectant spray.’) If I had a way to disinfect your air 24 hours a day naturally without chemicals or sprays is that something you would be interested in?”

**Transition into VOC and odor control:** “The EPA states that VOCs, gases and other odor causing contaminants are 2 – 5 times worse that outdoors. The cool thing about our UV lights is that they have two wavelengths. One controls the germs and the other controls the gases. So, you get the 24 hour disinfecting and the gas and odor control comes along with it.”

1. **Understanding – 3 phases of contamination:** Based on your communication described above there needs to be a pre-understanding that it’s just not the visual dust problem, but that there are three phases of indoor air contaminants identified by the EPA and the CDC and that your IAQ product solutions can control all three depending on which option that they pick. And as you can see in the communication section we have not given any technical information. Just layman’s terms that they can relate to and understand.
2. **Solutions – Packages and options:**

The best way to get the homeowner to understand IAQ products and solutions is to have IAQ product packages already build and ready to present to the homeowner.

We can help you build these packages in a very easy to understand format. I like to have 4 packages available. The top end will control all three phases of contamination with an extra feature that may include duct cleaning or dual air cleaners. Package 2 will also control all three phases of contamination without the extra features. Package 3 will only control particles and germs and package 1 will only control the particles with no germ or gas phase control. Once you give a brief explanation of each package then just ask a simple question: “Which package best fits your budget and your needs?” Then be quiet and let the homeowner concentrate and study the options. Answer question if they ask, but don’t interrupt their thought process.

**“It depends on what it cost?”** When presented as described above it is still inevitable that most will ask “How much will it cost?” You won’t get “it cost too much” during F.O.C.U.S. because you haven’t talked about price during the diagnostic or maintenance stage, yet you did ask the question “Is there any reason why you wouldn’t want a better filter or a proper air cleaner to prevent this from happening in the future? And/or “If I had a way to disinfect your air 24 hours a day naturally without chemicals or sprays, is that something that you would be interested in?” and the reply may be “Well it depends on what it cost?” The worst thing a technician could do at this point is pull out a price list because that puts him in selling mode and the homeowner on the defense. Remember you came there to fix or maintain something not to sell something. So, finish fixing or maintaining and come back to the investment later in the call. This puts everyone at ease with no pressure applied.

It would go something like this after the question is asked during step 3 – Communications above:

**Homeowner:** “Well that depends on what it cost?” or “yeah I’m interested, but how much is it?”

Technician: “That depends. I have to finish up wiring the part and cleaning up afterwards. We run into these challenges every day and I have some options for you. So, when I’m done I’ll go to my truck and get your packages options and you can pick the best one that fits your budgets and your needs. OK?”

In this way the technician doesn’t have to feel under pressure to go into sales mode and the homeowner can appreciate the fact that the technician wants to concentrate on fixing or maintaining the system first.

We cover IAQ products and practice communications in more detail during our training sessions, yet this should give you a good idea of our process and the steps involved.

Here’s to your clients breathing Cleaner, Fresher and Healthier air!

As always, at EGIA we are interested in helping you build more profitability, better business processes, and improving your contracting lifestyle.

Also access the numerous videos supporting the information you gathered in this article on Indoor Air Quality.

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