



New Client Questionnaire-HVAC

We are frequently asked about how to get started and what information we will need to prepare the training and scripting package. In order for us to define the approach, we will need the following information. You can answer the questions below and fax to us at 620-717-7671 or contact us to schedule an interview time where we can gather the information that we will need to better understand your business and competitive advantages.

Contact Information:

Contact Name(s) _____

Company Name _____

Address _____

Web address _____ Phone _____

E-mail address _____ Fax _____

Goals of the program – Please describe what results you are seeking (leads, in person appointments, customer service needs, market research, other) and what you would like to achieve with your sales program? Are you seeking in person appointments, phone appointments, or leads?

Contact list – If you will be providing the contact list, it should be in XLS or CSV format. If we provide the contact list, it can be based upon the following factors:



Please advise of the geographical areas based upon zip code, city, metro, county, or state that we should be contacting.

Please list contact titles you would normally target when making calls. Example: Facilities Director, Chief engineer, Maintenance Manager, Purchasing agent

Please advise of the number of employees for your prospect list. You may have multiple selections from the following list: 0-9, 10-19, 20-49, 50-99, 100 to 249, 250 to 499, 500 to 999, and above 1000.

We can target all businesses or specific types of businesses based upon SIC codes. Please describe the types of businesses you want us to pursue. For example: Manufacturers, Printing companies, Commercial Real Estate, Schools, etc.



Who will be conducting the appointments or responding to leads?

If you are seeking appointments, what type of appointments are you seeking? Phone appointments, in person appointments or web based?

Gathering more information with qualifying and probing questions:

Before we generate a lead or schedule an appointment, we will attempt to gather information to qualify your prospect. What questions are important and what information should we gather? For Example: Do you have a contract? When does it come up for review?

Other information and sales materials:

Please advise of the materials that you can provide for us in preparing your training and scripting program. For example, some clients provide recent sales letters, brochures, website URL, etc. Please e-mail those items to us or fax those items to 815-927-0110.



Please advise of the materials that we will have available to send to your prospects. Do you have PDFs available-if so please attach.

Please provide 3-5 sentences to introduce your products or services?



How would you describe your company?

Please tell us about your company history. How long have you been in business and explain how your company compares to your competitors.

Please provide any additional comments that might be applicable to development of your program.

We will use the above information to prepare the training and scripting package. We will provide this document to you via e-mail for your review and feedback.

Please send your favorite sales letters, PDFs, or brochures.