



Week 5: Closing the Call

Role Play Introduction – Player A

You will be continuing the role you played previously as a service representative for a fictitious “smart building” company called McConnell Environmental Systems and Controls (see box below if you need a reminder).

To begin the role play, read the background for your on page 2 and make notes on page 3 to guide you during the role play.



McConnell Environmental Systems and Controls, a rapidly growing division of McConnell Industries, designs, manufactures, and distributes a broad range of products for energy management and controlled environments. McConnell products and services are grouped into these four categories:

1. Environmental Management Systems, such as the MC-2200, are computer-based systems to monitor and control environmental quality and achieve energy efficiency. These systems control a building’s HVAC (heating, ventilation, and air conditioning), lighting, and security systems.
2. Environmental Control Products include thermostatic controls, devices to monitor air quality, energy-use monitors, and a broad array of electronic, pneumatic, and mechanical controls.
3. Energy-Efficient Lighting Products include a variety of automatic switching devices as well as a complete line of energy-efficient fluorescent and incandescent lamps.
4. A full range of services including field service, technical support, consulting, training, implementation and site planning, 24/7 support, and remote system monitoring. McConnell has full-service capabilities to maintain its own systems and related equipment as well as systems from other suppliers.

Role Play: Global Medical Instruments

YOU ARE THE MCCONNELL SERVICE REPRESENTATIVE

Instructions: You completed the service, and now your objective is to close the service call in a way that supports, clarifies, and ensures the value of the call and the service relationship. In preparation, read the information below and the information in the boxes on page 3. During the role play follow the R3 Service approach and the guidelines provided in the right-hand column on page 3.

Your Role: You install, maintain and repair the MC-2200 system and devices related to the monitoring and control of building environments.

Customer Organization: Global Medical Instruments manufactures a broad range of high-quality plastic health-care products. In order to ensure manufacturing quality and reduce energy costs, Global relies on the MC-2200 system, which monitors and controls the facility's HVAC (heating, ventilation, and air conditioning), lighting, and some machinery.

The Situation: Pat King, Global's production manager, called McConnell to complain that the MC-2200 is set up improperly and is not managing energy efficiently. After you conducted a thorough diagnosis, you and King now agree that the MC-2200 has been working properly; Global's own staff, however, had overadjusted several settings in an attempt to minimize quality-control problems with a new line of surgical products.

The skill application will begin when you propose to summarize the call

Role Play 1: Global Medical Instruments

McConnell Service Representative (notes).

1. Summarize call 

During the call you guided Terry Walker (Global's MC-2200 manager/programmer) to make some key adjustments. You also recommended that King and the production staff work more closely with Walker to better understand the environmental requirements, fine-tune the MC-2200 system, and monitor results.

King has agreed to follow your recommendation in order to achieve better results with the MC-2200 system.

2. Listen/Probe for agreement

3. Propose action 

The following action items are essential for Global to achieve its stated purpose of minimizing energy costs while maintaining product quality: (1) Pat King and Terry Walker will meet as soon as possible to develop an approach for working together, and (2) Walker will begin carefully and systematically adjusting the environmental settings on the MC-2200 to use less energy while King's staff monitors the results and provides Walker with feedback.

You will provide detailed documentation of your findings and your recommendation so that (1) King can explain how the MC-2200 is saving money and improving quality, and (2) King and Walker can easily implement the approach you recommended.

King understands that Global will receive an invoice for today's service and has agreed to promptly pay it.

4. Listen/Probe for commitment