



Role Play Introduction – Player A

You will be taking part in a role play as a service representative for a fictitious “smart building” company called McConnell Environmental Systems and Controls (see box below). This is the same fictitious company that is portrayed in the video examples during the R3 Service Webinar.

To begin the role plays, read the background for your first role on page 2 and make notes on page 3 to guide you during the role play. After enacting the role play, briefly discuss with your partner how it went and how it might be improved.



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 1: Global Medical Instruments

YOU ARE THE McCONNELL SERVICE REPRESENTATIVE

Instructions: Your objective is to use the *R3 Service* Opening the Call approach to establish a productive tone, direction, and focus for this service call. Learn *just enough* about the big picture and ptm (people, time, and money) pressure to define the purpose and priorities and devise a reasonable initial plan for the call. **Do not try to diagnose the customer's problem during this opening.**

Your Role: You maintain and repair the MC-2200 environmental system and a wide variety of electronic and mechanical devices related to the monitoring and control of building environments. In your work you are also called upon to troubleshoot and resolve problems that involve heating, ventilation, and air-conditioning (HVAC) equipment from a variety of manufacturers.

Customer Organization: Global Medical Instruments develops, manufactures, and distributes a broad range of health-care products. The main manufacturing plant produces high-quality plastic products such as catheter systems, hypodermic devices, surgical kits, and laboratory supplies. Global relies on the MC-2200 system to monitor and control the facility's HVAC system, lighting, and much of the production machinery.

The Situation: You are about to meet Pat King, production manager at Global's manufacturing plant. King called McConnell and requested a service call but provided little information. You were told that King was impatient, claiming that Global's MC-2200 isn't set up properly and requires a visit from a McConnell "programming expert."

You have never been to Global, but you helped King resolve some site-planning issues over the phone during installation of the MC-2200 about two years ago. King, however, probably doesn't remember you by name.

The skill application will begin when you enter King's office.

Role Play 1: Global Medical Instruments

McConnell Service Representative (notes).

1. Greet/Introduce

2. Relate and connect

big picture
ptm pressure

3. Define purpose and priorities

4. Communicate plan

5. Listen/Probe for agreement