



Role Play Introduction – Player B

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 that 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. Services include 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 2: Universal Insurance Company

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 equipment (HVAC) from a variety of manufacturers.

Customer Organization: Universal Insurance Company specializes in property and casualty insurance for business and residential customers. The company has 1,800 employees nationwide; 700 of them are located at Universal's headquarters. Four years ago, Universal installed the MC-2200 system in all its locations in order to reduce energy costs and provide an optimal working environment for its employees. The MC-2200 monitors temperature and air quality and controls the HVAC (heating, ventilation, and air conditioning) system. The HVAC equipment itself (boilers, compressors, ducts, etc.) is supplied and maintained by Boylen Corporation.

The Situation: You are at Universal's headquarters to perform routine maintenance on the MC-2200 system. Facilities Manager Chris Webb has asked to meet with you to discuss a problem that *may* involve the MC-2200.

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

Role Play 2: Universal Insurance Company

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