



Week 5: Closing the Call

Role Play Introduction – Player B

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: Universal Insurance Company

YOU ARE THE McCONNELL SERVICE REPRESENTATIVE

Instructions: 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 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: As a McConnell service engineer, you maintain and repair the MC-2200 system and devices related to the monitoring and control of building environments. You are also called upon to troubleshoot and resolve problems that involve HVAC (heating, ventilation, and air conditioning) equipment from a variety of manufacturers.

Customer Organization: Universal Insurance Company specializes in property and casualty insurance for business and residential customers. The company relies on McConnell's MC-2200 to monitor temperature and air quality and control the HVAC system. The HVAC equipment itself (boilers, compressors, ducts, etc.) is supplied and maintained by Boylen Corporation.

The Situation: You have been working with Universal's Facilities Manager Chris Webb to determine whether there is an air quality problem in the headquarters building. From speaking with Webb and analyzing data, you were able to guide Webb's assistant to locate a damaged Boylen air duct and a severed McConnell cable in the southwest wing of the building.

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

Role Play 2: Universal Insurance Company

McConnell Service Representative (notes).

- 1. Summarize call 

Webb had been right—there was an air-contamination problem. Construction workers had damaged a Boylen air conditioning duct and severed a McConnell cable. To take care of the immediate problem, you had Webb’s assistant close several vents that were feeding into the duct and allowing unfiltered air to seep into the office space. You recommended a service contract to cover the HVAC system as well as the MC-2200, assuring Webb that McConnell has the capability to maintain and repair Boylen equipment.

Webb then asked for your assurance that the air quality problem was completely solved. You agreed to offer that assurance on the condition that McConnell be given total responsibility for servicing the Boylen HVAC system. Webb accepted this condition.

- 2. Listen/Probe for agreement

- 3. Propose action 

In your opinion there are three remaining action items: (1) Webb will cancel the Boylen service call, (2) a McConnell service engineer will be at Universal first thing tomorrow morning to repair the air duct, replace the damaged cable, and run some additional tests to ensure that air quality throughout the building is acceptable, and (3) you will provide Webb with the necessary assurance to convey to the executive committee.

- 4. Listen/Probe for commitment