

# TM Pre-Call Planner



## CUSTOMER INFORMATION

Dealer Name: <b>LennoxPros.com</b>	Customer Number:
Meeting Date/Time:	YTD Sales:
Meeting Location:	Prior Year YTD Sales:
Meeting Length:	YTD Sales Delta:

## CUSTOMER RETENTION INDEX (CRI) METRICS

CRI Score:	CAP Package:
E-Invoice:	Spiffs:
HVAC LS Participation:	Rebates:
DaveNet R12 Range:	Marketing Roll-off:
Premier Dealer (FP/FS):	Stocking (Product Benefits):
Product Profile:	Marketing Benefit Range
	Marketing Program Benefits:

## OBJECTIVES

**Primary:** By end of the meeting, get verbal commitment for all employees to utilize LennoxPros.com to improve efficiency and productivity within their organization

**Secondary:** Sign up employees on LennoxPros

Questions for the Call:

**Situation** (*Finding out facts about the dealers' situation – What questions do you not have the answer for already?*)

- How do you currently utilize Davenet?
- How are you ordering equipment?
- How do your technicians, installers, and comfort advisors get product information?

**Problem** (*Asking about problems, difficulties, or dissatisfactions that exist which we can solve.*)

- Are you satisfied with your homeowner customer service?
- Are you satisfied with your productivity and efficiency?
- Do your employees wait on hold to check availability, pricing or orders?
- How often are they on the phone while another customer is on hold?
- Do your technicians or installers miss Service and Application Notes that leads to incorrect installations?
- Does your team miss AHRI updates or install non-compliant systems?

**Implication** (*Asking about the effects or consequences of their problems if they don't take action.*)

- What could your employees be doing besides waiting on hold to complete orders? What if a customer is on the other line or walks in your store? How does this affect your reputation?
- How do incorrect installations or service calls affect your business?
- How much time and money are you wasting having a technician drive to a supply house without knowing if they have the part?

**Need/Payoff** (*Asking about the value or usefulness of our proposed solution to their needs.*)

- Once LennoxPros increases your employees efficiency and productivity, how is your business affected?
- Would having Lennox information in a matter of seconds help increase efficiency and responsiveness to your customers?

## OBJECTIVES (Continued)

### Potential Objections and Concerns

<p>Objections to Primary Objective:</p> <ol style="list-style-type: none"> <li>1. I call my TM, SM, or customer service for information.</li> <li>2. My techs call the office for information.</li> <li>3. I don't trust online availability.</li> <li>4. I won't be able to find the products I need.</li> <li>5. We've been doing it this way for years...why change now?</li> <li>6. I don't want my techs to see pricing.</li> </ol>	<p>Our Response:</p> <ol style="list-style-type: none"> <li>1. You get the benefits of 24/7 access to information.</li> <li>2. Pay one person to do the job (as opposed to a tech and office support). Mention technician shortage (estimate of 20,000 in 2014) and the importance of efficient operations.</li> <li>3. Real-time availability pulls directly from our ERP system. Our single step model allows Lennox to provide you with accurate delivery dates across all channels (online, store, customer service).</li> <li>4. Easy to use. Search products by name, part number, model number, or catalog number. Filter by specifications.</li> <li>5. World is changing and <b>so is your competition</b>. The "way you have always done it" won't have the same effect tomorrow as it does today. Customers expect information at the speed of NOW. <b>Change the game</b> for yourself and for your company.</li> <li>6. With LennoxPROs.com, you are in control of your team's permissions from pricing to ordering.</li> </ol>
<p>Objections to Secondary Objective and/or Questions:</p> <ol style="list-style-type: none"> <li>1. How do I login to LennoxPROs.com? I don't want to re-register right now. I am too busy.</li> <li>2. Do I have to switch to LennoxPROs.com completely? I don't want to take that risk right now.</li> <li>3. Does the account admin need to go to LennoxPROs.com first?</li> <li>4. Do I need to re-download the mobile app?</li> <li>5. How do I provide feedback?</li> </ol>	<p>Our Response:</p> <ol style="list-style-type: none"> <li>1. Your DaveNet credentials will work on the new LennoxPROs.com site. <b>No re-registration</b>. Click "Sign In" in the upper right corner and enter your DaveNet User ID and password. That's it.</li> <li>2. Both DaveNet and LennoxPROs.com will run in parallel for the remainder of the summer. If you are not comfortable with lennoxPROs.com, you can still use DaveNet.</li> <li>3. No. All members of your team have the option of using DaveNet or LennoxPROs.com.</li> <li>4. No. The DaveNet application will update to <a href="http://LennoxPROs.com">LennoxPROs.com</a> at the end of the summer. LennoxPROs.com is mobile-ready and fully accessible from any smart device or mobile browser.</li> <li>5. We welcome and need your feedback on how we can improve the new LennoxPROs.com site. Send your email to: <a href="mailto:Support@LennoxPROs.com">Support@LennoxPROs.com</a> or enter a support ticket via the "Help" link on <a href="http://LennoxPROs.com">LennoxPROs.com</a> (upper right hand corner of site).</li> </ol>

## MEETING AGENDA

### Key Dealer Participants (Name / Role)

Owner  
Sales Manager  
Comfort Advisors  
Customer Service Manager

### Key Lennox Participants (Name / Role)

TM

## INSIGHT REFERENCE MATERIAL

### Key Reference Insights: (What unique insight or strength does Lennox bring to the topic at hand?)

*American businesses lose \$83 billion each per year due to poor customer experiences!*

*What happens after poor customer experience?*

- 56% will never use a company again
- 20% will take revenge by posting a review online
- 52% will tell family and friends about the experience

- LennoxPROs.com will make your team **more efficient** by having a one-stop-shop for your HVAC needs. **Work Smarter. Not Harder.**
- **Stay in front of the competition.** Meet increased homeowner expectations.

### Supporting Insight Materials: (What reference materials will be needed to support the insight topic?)

LennoxPros.com Powerpoint

#### Benefits:

1. Easy-to-use, central online product catalog
  - 1 catalog for Parts, Supplies, Accessories and Equipment
  - The online catalog features product images, specifications, training videos, and easy-to-use filters.
2. Real-time product availability
  - Real-time availability for shipping or pick up simply by entering your zip/postal code.
3. Accessories
  - No more guess work. Accessories are listed on the equipment product page.
4. Easy ordering 24/7
  - Ordering has been simplified across desktop, mobile and tablet.
5. HVAC eTools. Work Smarter. Not Harder

- Technical tools
  - AHRI Residential Matchup Tool
  - OEM Repair Parts (+ mobile bar code scanner)
  - Manual S Capacity Calculator
- Sales tools
  - Proposal tool *Pilot*
- Warranty tools
  - Warranty lookup (+ mobile bar code scanner)
- Marketing tools
- Training center

6. BYOD (Bring your own device)

- Desktop, tablet, smartphone
- LennoxPROs.com works for you wherever you are on any smart device.

For more customer-facing information and “How to” documentation, visit the LennoxPROs.com welcome page:

<https://www.lennoxpros.com/news/welcome-to-lennoxpros>

[Click here for TM Information, “how to” documentation and benefits.](#)

Existing Customers: Helping existing customers make the transition is simple.

1. DaveNet credentials work on LennoxPROs.com. No need to re-register, just sign in.
2. No DaveNet account? No problem. [Register in 3 quick steps.](#)

Prospects: Let LennoxPROs.com guide your prospects through the sales funnel.

Create a customer number AND open a Lennox PROs.com account in 3 simple steps:

1. Click "Sign in" on [LennoxPROs.com](#).
2. Click “I am an HVAC Professional” and complete the form.
3. A customer number will be assigned immediately.

No need to establish a separate customer number in SAP. No wait times.