



SALES CALL QUALIFICATION FORM

Hello. May I please speak to the person in charge of your facilities?

[When you have reached the correct person, continue.]

Enter the name of the person you are speaking to: _____

Mr./Mrs. (name of person you are speaking to), allow me to introduce myself. This is _____ from *ECO Zero*. The reason for this call is to talk to you about how we can help you cut your energy supply costs by 10% or more and your energy and water usage costs by up to 40%. Our clients are experiencing savings in the range of 50 to 90¢ in energy costs per square foot each month, while also improving their working environment and productivity. At no cost to you, we can present several alternatives where you will immediately see energy savings.

[At this point, you may hear some common objections:]

I don't have the money to invest in a survey.

I don't have the money to upgrade my plant to gain from these efficiencies.

I have already made all the energy efficiency upgrades that I can.

[Listen to objections, and continue.]

I understand Mr/Ms (name of person you are speaking to). What I would be pleased to do for you, is to come down to your office and collect pertinent energy utility information. There's absolutely no cost to you for this service. I'd like to meet with you, review energy, water and waste bills, ask you a series of questions. I'll then leave your offices to complete the analysis using *ECO Zero* proprietary systems and software.. I'll return about a week later with a preliminary analysis of the savings that we can bring to your bottom line. Would this be of interest to you? *[If yes, continue to qualify the potential client:]*

Before we make an appointment, let me make sure your company meets our minimum criteria.

	YES	NO
1. Does your company use more than \$50,000 of electricity and/or natural gas each year?		



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- | | YES | NO |
|---|--------------------------|--------------------------|
| 2. Does your facility or office measure at least 20,000 square feet? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Is your facility or office at least 5 years old and you have not completed any energy improvements in the past 5 years? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Would your company be willing to install the recommended energy improvements that we find from our audit—after we show you how the savings of these improvements would pay for themselves over time? | <input type="checkbox"/> | <input type="checkbox"/> |

Great! Based on the answers you just gave me, I think we will be able to show you how to achieve significant savings in your operations.

[Go to the next page and schedule an appointment.]



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Which day of the week is best for you? DOW: _____ DATE: _____

Morning or afternoon? (Get specific time.) _____

Should our auditor speak to you, or is there someone else in your organization he should see?

(If not the person on the phone, name: _____)

Position/Title: Office manager/Facilities manager/Other: _____)

What is the contact's phone number: _____

What is the contact's email address: _____

YES NO

May we email you a list of items that we would like to pick up at the time of our survey?

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(Gas/Electric utility bills; waste removal bills—all for past 12 months.)

Verify the Name of the company: _____

Address: _____

[At this point, confirm the time and date of appointment.]

Thank you very much for your time. Good bye.

Sales Person: _____

Date: _____