

PRICING INQUIRY CALL

INSTRUCTIONS • QUESTIONNAIRE

Call a company that services commercial rooftop HVAC systems to inquire about their service costs by role-playing as working for an investor who is purchasing a building in the area. Ask the required questions and document the responses. The call is expected to take 5-10 minutes.



Before You Begin

- Know the scenario/how to present it
- Review the required questions
- Be familiar with the building specs provided
- Be prepared to take notes



Don't Forget!

- Ask all required questions
- Write down all quoted pricing
- Report all information provided
- Get the employee's name and role



General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Check your shop confirmation for the:
 - City, state, and zip code where the building is located
 - Phone number to call
 - Approved hours to call
- Make the call using a cell phone you will have access to later. The company you call may capture your phone number via their caller ID and use it to follow up with you.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the shop requirements.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot have ever worked for the company you are scheduled to call.



Shop Instructions

Step #1: Print the checklist & have it available to reference during the call

- [Click here](#) to access the checklist that includes the opening statement, the required questions you must ask and the answers to give for questions about the building that you may be asked.
- Have the checklist in front of you before you call. Print it out or pull it up on a computer.
- Take notes on the document or on a separate piece of paper to remember what was said. The more notes you take, the better. Be detailed when submitting the information you received.

Step #2: Call the location and make the opening statement

- The call may be answered by a receptionist. If prompted, select the option for 'sales' or accept a transfer to sales.
 - If you are re-directed, offered a transfer to someone else, or asked to call another number, you must accept the transfer or call the other number to complete the shop.
 - Document the other number(s) you are asked to call in your report.
- **Opening Statement:** "Hello, I am part of an investor group that is looking to buy a commercial office building in the area. We are trying to build an estimate of the building's operating costs for our financial model and are looking to understand the rates of service providers we'd expect to frequently use, including HVAC. Can you help me understand the pricing structure we would be looking at for HVAC services?"
 - Note: HVAC is Heating, Ventilation, and Air Conditioning.
- If asked the address or where the property is located, say, "I can't disclose the property we're looking at, as I'm under a non-disclosure agreement but just doing due diligence and getting pricing together for our financial model as we look to build our roster of service providers for when we close the transaction. I can tell you it's in [city & state listed in your shop confirmation]."
- If your phone number is questioned as out of state, say, "We're out of state but love the area and are planning on investing there."

Step #3: Ask all required questions

- Ask all required questions. If you forget to ask a question, call back to get the answer.
- If asked questions about the building, answer based on the information in the checklist.
 - If asked questions not in the checklist, always default to, "I'm not sure but I can get the information and follow up if needed. We're really just looking for an estimate right now."
- If the employee is hesitant to provide any of the pricing information, encourage them by saying, "We are building our roster of service providers we will use once we close on the property and begin building our portfolio."
- If they refuse to provide pricing information, end the call and submit your report as unsuccessful.

Unable to reach a representative or obtain pricing information (unsuccessful shops)

- If you cannot complete the call on the first attempt because the call is disconnected, you reached voicemail, you received notice the office is closed, they asked to have someone call you back, you were asked to call at another time, or you received a busy signal, make at least two more call attempts on different days before submitting your report as unsuccessful.
 - If you get voicemail or are offered a call back, provide your name and phone number.
 - Your three call attempts must be on different days during listed call hours.
 - If you are unable to speak to someone at the office after three call attempts on three different days during allowed hours, submit your report.
- If you cannot obtain pricing after a good faith effort, submit your report as unsuccessful.

Step #4: Submit your report and upload a screenshot showing the call from your recent call log.



QUESTIONNAIRE

Shop date:

Start time:

End time:

Pricing Information

1. What date and time did you first call the location?

Enter the date and time you first called the location. This should be the same as the start time you entered on page 1. Required format: MM/DD/YYYY HH:MM AM/PM

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2. Were you able to speak to someone responsible for providing pricing information on your first attempt?

If you made the required number of calls and were not able to get through to speak with a representative about pricing, select N/A – call was not successful.

☐ Yes, I spoke to someone responsible for providing pricing information on my first attempt

☐ No, I was told someone would have to call me back

☐ No, I had to leave a voicemail and wait for a call back

☐ No, I was asked to call back at another time

☐ No, office was closed during business hours

☐ No, there was a busy signal

☐ No, I was given another number to call

☐ No, the call was disconnected before I could speak to someone

☐ N/A – call was not successful

3. If you received voicemail or were asked to wait for a call back, how long did it take to receive a call back?

☐ Same business day

☐ Next business day

☐ N/A – did not receive a call back

☐ N/A – did not receive voicemail/was not asked to wait for call back

☐ N/A – call was not successful

4. When you obtained pricing information, did the first person you speak to provide the information or were you transferred to someone else?

☐ Yes, the first person provided the information

☐ No, I was transferred to someone else

☐ N/A – call was not successful

5. Date and time you spoke with a representative responsible for providing pricing information:

Enter the date and time you spoke to the representative responsible for providing pricing. Required format: MM/DD/YYYY HH:MM AM/PM

6. Name and role of the representative who provided pricing (if known):

Example: Kelly, sales representative. If neither name nor role was provided, enter 'Unknown'.

7. Which costs were you able to obtain?

Select all that apply.

☐ Street rate

☐ Rate if you are under maintenance agreement (contract rate)

☐ Mileage

☐ Travel/trip charge

☐ Surcharge

☐ Other cost(s)

☐ None of the above

☐ N/A – call was not successful

8. If street rate, enter the hourly quote given:

Enter the price without the dollar sign (ex: 90.00). Street rate and hourly rate are interchangeable and mean the same thing. Enter N/A if a street rate was not quoted.

9. If maintenance/contract rate, enter the hourly quote given:

Enter N/A if a contract/maintenance rate was not quoted.

10. Did the representative quote a different hourly rate between the first service hour and subsequent service hours?

Street rate and hourly rate are interchangeable and mean the same thing.

- | | |
|---|--|
| ☐ Yes | ☐ N/A – hourly rate not quoted |
| ☐ No, rate is the same for first hour and subsequent service hours | ☐ N/A – call was not successful |

11. If yes, what was the hourly rate for the first service hour?**12. If yes, what was the hourly rate for subsequent service hours (after the first hour)?****13. If mileage charge, enter the quote given:**

Enter the price without the dollar sign (ex: 00.40). Enter N/A if a mileage charge was not quoted.

14. If travel/trip charge, enter the quote given:

Enter the price without the dollar sign (ex: 100.00). Enter N/A if a trip/travel charge was not quoted.

15. If other cost, enter the quote given and the type of cost:

Enter the price without the dollar sign (ex: 30.00) AND the type of cost. Enter N/A if other costs were not quoted.

16. Were there any surcharges on top of the prices quoted?

- | | |
|------------------------------|--|
| ☐ Yes | ☐ Unknown – refused to answer |
| ☐ No | ☐ N/A – call was not successful |

17. Describe what was said when you asked about surcharges:**18. Describe what was said about the cost structure:**

Explain how the representative responded to every question you asked from the call checklist.

19. How many technicians do they have?

- | | |
|---------------------------------------|--|
| ☐ Less than 10 | ☐ Unknown - refused to answer |
| ☐ 10-20 | ☐ N/A – call was not successful |
| ☐ More than 20 | |

20. What is their guaranteed response time for emergencies?

- | | |
|--|--|
| ☐ 1 hour or less | ☐ More than 4 hours |
| ☐ 1:01 to 2 hours | ☐ Unknown – refused to answer |
| ☐ 2:01 to 3 hours | ☐ N/A – call was not successful |
| ☐ 3:01 to 4 hours | |

21. Do they service VRF units?

VRF unit = Variable refrigerant flow unit

- | | |
|------------------------------|--|
| ☐ Yes | ☐ Unknown – refused to answer |
| ☐ No | ☐ N/A – call was not successful |

22. If you were unable to speak to someone or unable to obtain pricing at all, please explain:
For successful and unsuccessful calls, upload a screenshot showing the call(s) you attempted. If you were unable to successfully obtain pricing information, please explain in detail the date/time of the attempts made, and what, if any, conversation took place.

END OF QUESTIONNAIRE