

# Boiler PM Dialogue

**The Goal:** The goal of Boiler Preventative Maintenance is to help the boiler run efficiently and last without failures until the next service. We can't guarantee a boiler won't fail over a 6-month interval due to various factors out of our control, but our job is to recommend any potential risks we find to avoid the larger repairs. The goal while doing inspections is for repairs to be made the same day to avoid return trips. We have listed some sample dialogue below to help you with this process.

## Checking in:

1. **Purpose:** Explain why you are there, assume the manager is new. "I'm with Benrich Service Company, we have a preventative maintenance agreement with your property and I'm here to provide the service on your boiler systems."
2. **Service History:** "Any recent hot water or plumbing issues I should be aware of?"
3. **Identify decision maker:** "Who should I talk to regarding the condition of the boiler and any needed recommendations?"
4. **Prep the decision maker for recommendations:**
  - a. "Just as a reminder, my labor today is not charged and you only pay for parts if there are any needing replacement, with your approval."
  - b. "I don't make any commissions on parts sold, my job is just to give honest feedback on any needed repairs."
  - c. "Some smaller items such as HSI's or flame sensors don't typically last longer than a year. If I find any going bad, would you prefer I go ahead and take care of them as I'm working?"

## Getting repairs approved:

1. **Meet with the decision maker**
  - a. Take the time to meet – don't just ask for a signature and turn in paperwork.
    - i. "There are some important items I want to make sure you are aware of. Can I take a quick minute just to review the condition of your boilers and some recommendations?"
2. **Explain your recommendations**
  - a. Be quick and to the point, their time and your time is important
  - b. Prioritize the repairs with what is most vital to last till our next service
    - i. "I would definitely replace the HSI as it might not last until our next service, however the bad temperature gauge can probably wait to be budgeted for as it won't cause your boiler to fail over the next 6-months."
  - c. Showing pictures, bringing a sample part or having the customer look at the boiler is very helpful. (example: showing their deteriorated anode rod next to a new one)
3. **Getting approval**
  - a. "My job is to help you avoid future "no hot water" calls."
  - b. "I can get these repairs taken care of today labor-free and you will only pay for the parts. However, if we come back out, we may have to charge labor"
  - c. "If you can approve the repairs today, I'll just need your signature here..."

\*Signatures are required for approved repairs and for checking out – verbal's are not accepted. If there is not an on-site manager, emailed approvals from management can be accepted. Paper trails are always required.