



Lunch and Learn Recommendations

WHAT is a Lunch and Learn: A Lunch and Learn is an educational program that contractors provide for the benefit of their customers and/or prospective customers. It is intended to provide valuable and useful information and not be a company sales pitch. The benefits of a lunch and learn are to establish the contractor as the “expert” in a particular field, enhance customer service and goodwill, and provide added-value to your customer base. Depending on the time of day of the program, breakfast or lunch is usually provided.

WHO to invite: Customers and prospective customers should be invited. Depending on the topic, you may want to invite several representatives from one particular customer only, or you may want to invite representatives from a number of different customers. For example, you may offer a program specifically geared towards a certain profession such as building owners, building engineers, or financial personnel. If you are presenting a topic that is most relevant for one particular customer, you may want to offer a program exclusively for that customer.

WHAT to present: MSCA will be developing several general programs on different topics for your use. However, topics can be developed on a broad spectrum of topics depending upon your company’s specialties (e.g., supermarket refrigeration, geothermal, controls, etc.); your particular customer base (e.g., hospitals, data centers, schools, etc.); or even an issue pertinent only to your area (e.g., utility rebates, state/local regulatory issues, etc.). No matter the topic, it should be one which not only provides true take-home value for your attendees (you do not want to waste their time) but also demonstrates your company’s expertise and skills regarding the topic.

WHO should present: Depending on the topic, the program can be presented by one of your company representatives, a UA instructor, vendor representative or a field technician.

WHERE to hold the program: The program can be held at your company office, especially if you have a suitable conference room or lunch room. Other options include the customer’s facility or at a local hotel or restaurant. A UA training school is also an option if your school offers a good HVACR training program as it can provide an opportunity for customers/prospects to tour the facility and gain a better understanding and appreciation of the extensive training programs the UA offers.

HOW to ensure success: Invitations should be sent at least two weeks prior to the event. They can be in the form of a mailed invitation, e-mail or a personal phone call. The program should last approximately 45 minutes including an introduction, 20 – 30 minute presentation and time for questions

and networking. Your attendees will appreciate it more if the program is short and to the point, providing lots of good value, and not taking up too much time. A reminder should be sent a day or two prior to the event. A simple lunch or breakfast should be served. If a Power Point presentation is used, it should be simple and to the point and not exceed 12 – 15 slides. Handouts are also a good idea so attendees can take them back to their office for reference or to share. Make sure your company name and contact information is displayed on any handouts for easy follow-up and reference.

Remember this is not a sales presentation for your company but an informational program. Attendees will be more inclined to attend if they know they will not be subject to a sales pitch but rather be gaining useful information from a reliable expert.

What Topics Are Available?

[Visit our website](#) for a list of current topics.

Choose your topic, then select DOWNLOAD for a customizable PowerPoint presentation. The TIPS offer recommendations to help you make the most of your presentation.

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