

Successful Sales

Best Practices and Proven Techniques

HVAC Mechanical Air Sealing and Insulation Duct Sealing Home Performance

October 24, 2024



Energy
Efficiency
Program

Safety Moment



- Always face the ladder when ascending or descending
- Always maintain 3 points of contact
- The top of the ladder should never be used as a step
- Ladders shouldn't be moved, shifted or extended while occupied
- Never carry an object or load that could cause you to lose your balance

Our Presenter



Tom Piscitelli

His 45 years of experience in HVAC sales training, sales management, sales coaching, and business coaching have given him a broad and diverse business expertise. Tom has developed his sales training and business capabilities by working with major manufacturers, distributors, contractors, builders and utilities.

Selling with TRUST®

The Most Effective Sales
Training for Sales Professionals



T.R.U.S.T.[®] *Sales Process*



The Six Sales Behaviors that Create Extraordinary Sales Results:

1. Asking for the sale
2. Engaging customers in the discovery of their problems
3. Offering CHOICES®
4. Using financing effectively
5. Following up until the customer “says YES or NO”
6. Adapting your selling style to match your customer’s



The Six Sales Behaviors that Create Extraordinary Sales Results:

1. Asking for the sale



The TRUST[®] Promise

You will be more comfortable and confident during your sales calls, producing happier customers, creating even greater sales success.



NEXT!

TAKE
A
NUMBER

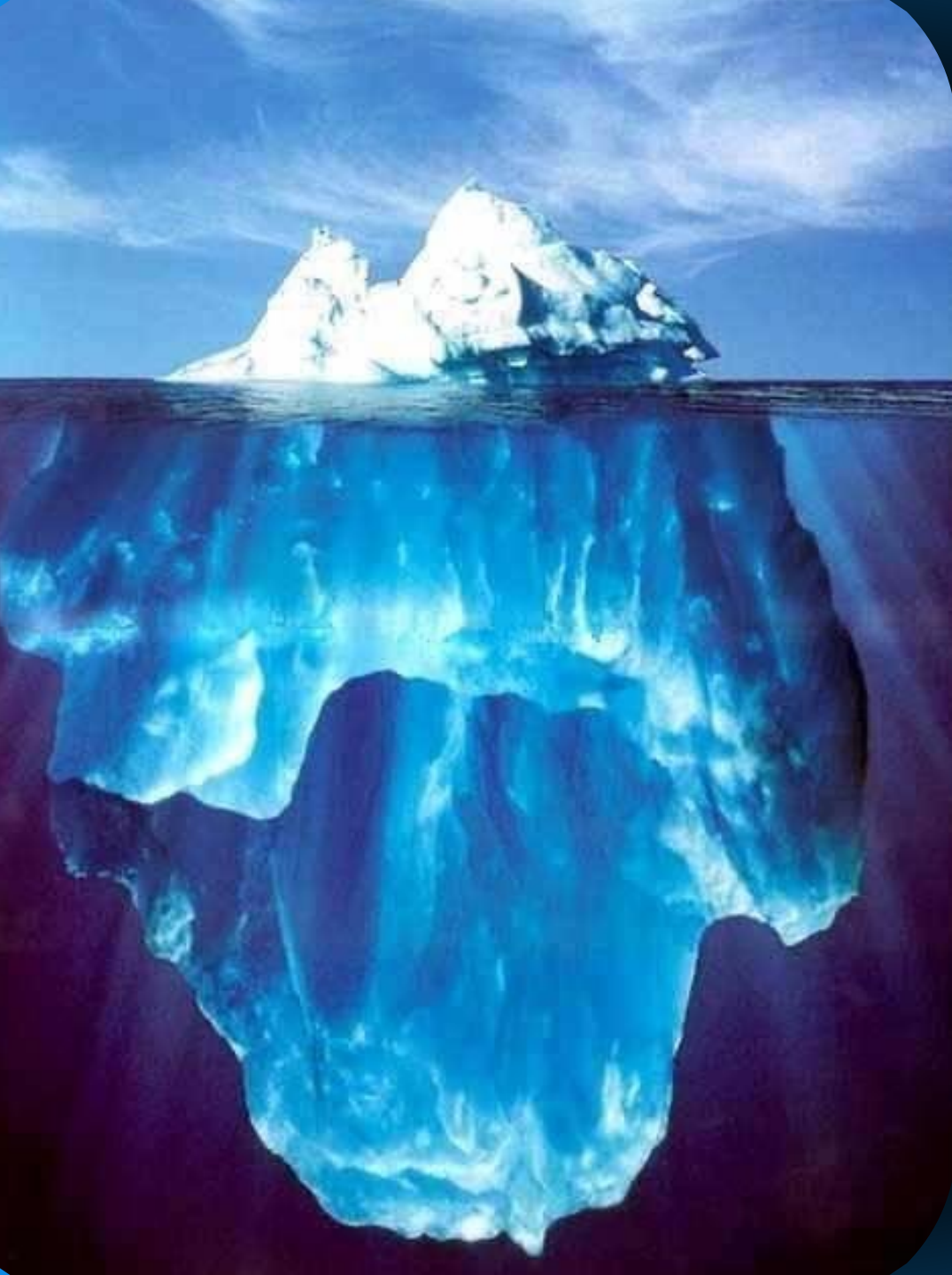
7

5

4

6





***The Customer
sees very
little of what
we do...***

***Just like the
tip of an
iceberg...***

What you see:

Furnace

Air
Conditioner

Thermostat

What you also receive:

88 years of
experience

Each job inspected
with a 17-point check
by installation
supervisor

Manufacturer's
recommendations
and local codes are
minimum standards

Financial
strength

Service trucks
with genuine
factory parts

Drug-free
company

Multiple finance
choices

Expertise in all
home comfort
problems

Employees
On call 24/7

Licensed,
bonded, and
insured

Heat Loss and Heat
Gain Load Calculation
on every home

Preferential service for our
Peak Performance
customers

Special care taken
to protect your
home during
installation

Comfort guaranteed in
writing

Factory-
trained
Installation &
Service
Technicians

All installers and
service technicians
wear photo ID

*The Customer
sees very
little of what
we do...*

*Just like the
tip of an
iceberg...*





Sell Yourself

Sell Your Company

- ✓ 1-Stop Shop
- ✓ Licensed
- ✓ Bonded
- ✓ Satisfaction Guaranteed



Sell a SOLUTION to your customer's problems



*When you talk, you have no idea what
the customer is thinking about.*

*When you ask questions, you can
influence what the customer is thinking,
but you cannot control their thoughts.*



People don't care how much you
know,

*until they first know how much
you care.*

Zig Ziglar



“When you say it, they can doubt you.

When they say it, it’s true!”

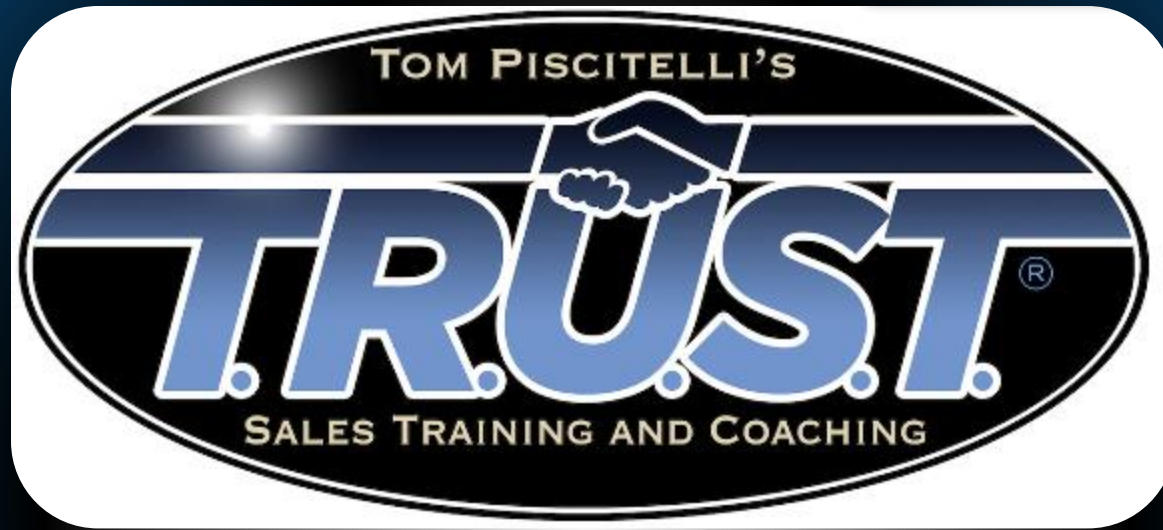
Michael Oliver



Listening ...is a gift you give.

Michael Oliver





T.R.U.S.T.® Principles

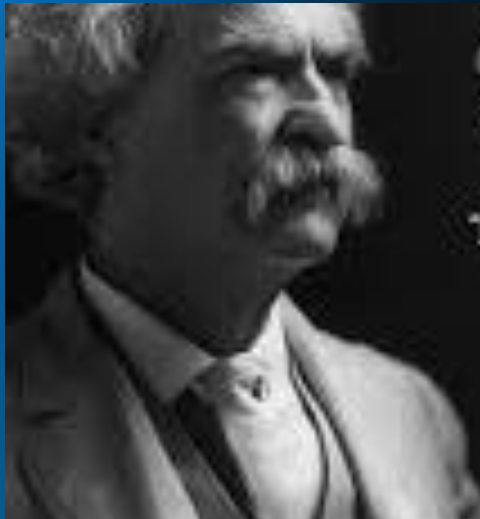




TRUST



Tell the Truth



“ALWAYS TELL THE TRUTH. THAT WAY, YOU DON'T HAVE TO REMEMBER WHAT YOU SAID.”

— MARK TWAIN

THE SCOUT LAW

A Scout is...

TRUSTWORTHY	OBEDIENT
LOYAL	CHEERFUL
HELPFUL	THRIFTY
FRIENDLY	BRAVE
COURTEOUS	CLEAN
KIND	REVERENT



“WHEN IN DOUBT TELL THE TRUTH.”

MARK TWAIN

© Lifehack Quotes



R^elationship



Understand



Show them CHOICES®



Take Action



Selling is simple. Just find out what the customer wants and offer it to them.



- 🌐 Problems exist in every home
- 🌐 Homeowners want someone they can trust
- 🌐 People want information
- 🌐 Everyone appreciates having choices
- 🌐 You can ask for the sale without being pushy



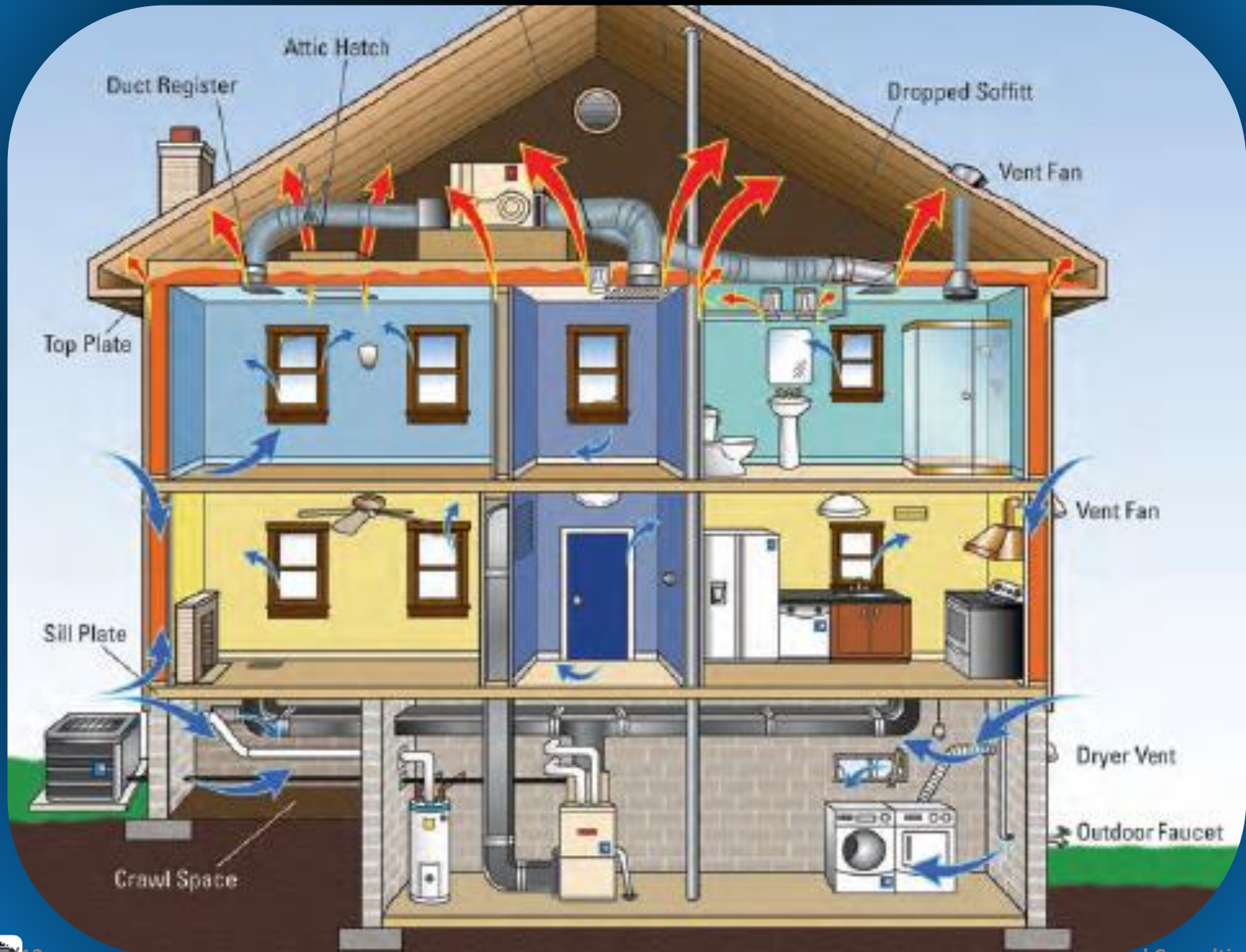
Problems Exist in Every Home



Customers expect you, as an expert, and as their advocate, to investigate everything that is important and could be a problem for their family or business.



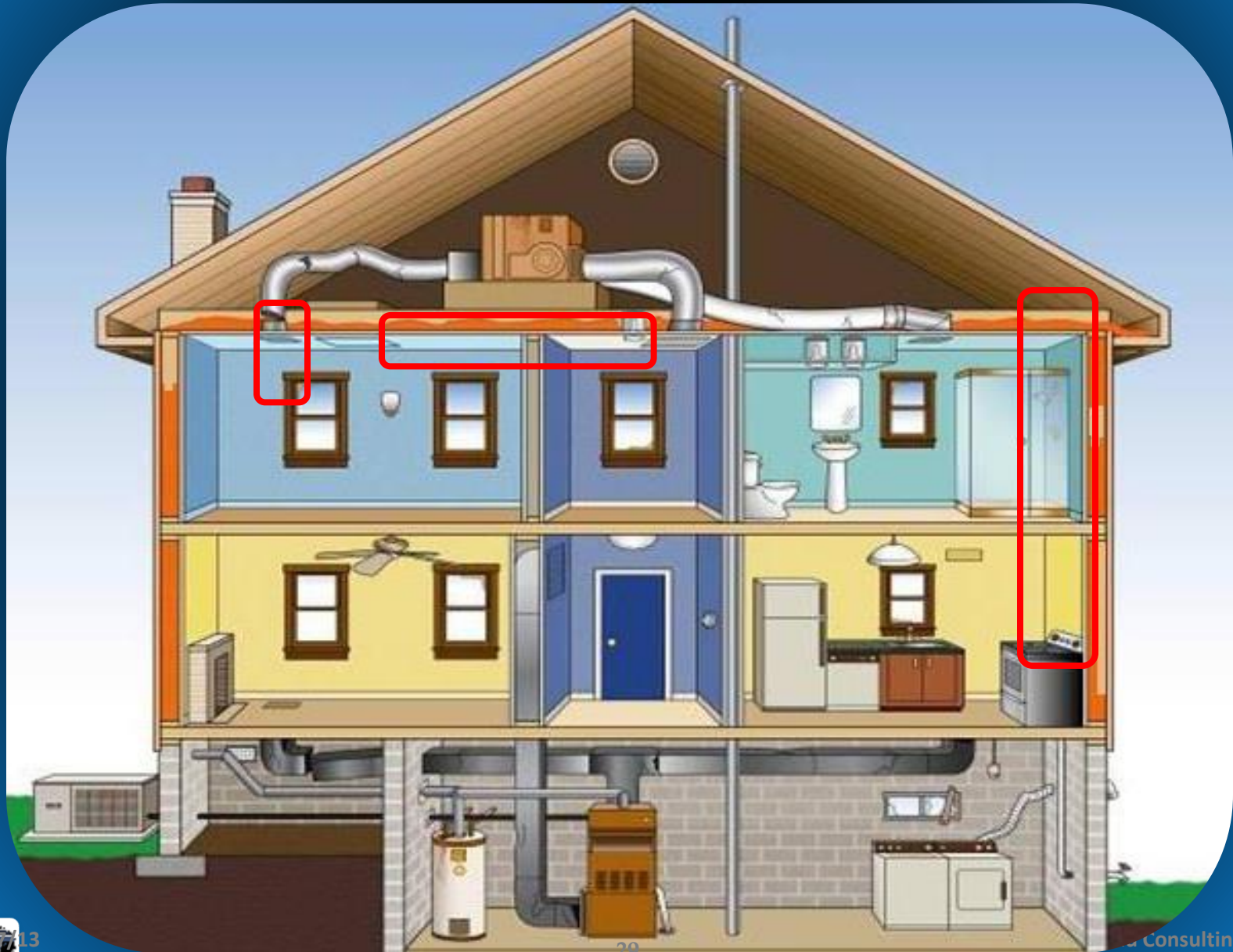
Houses Leak!



Ducts Leak

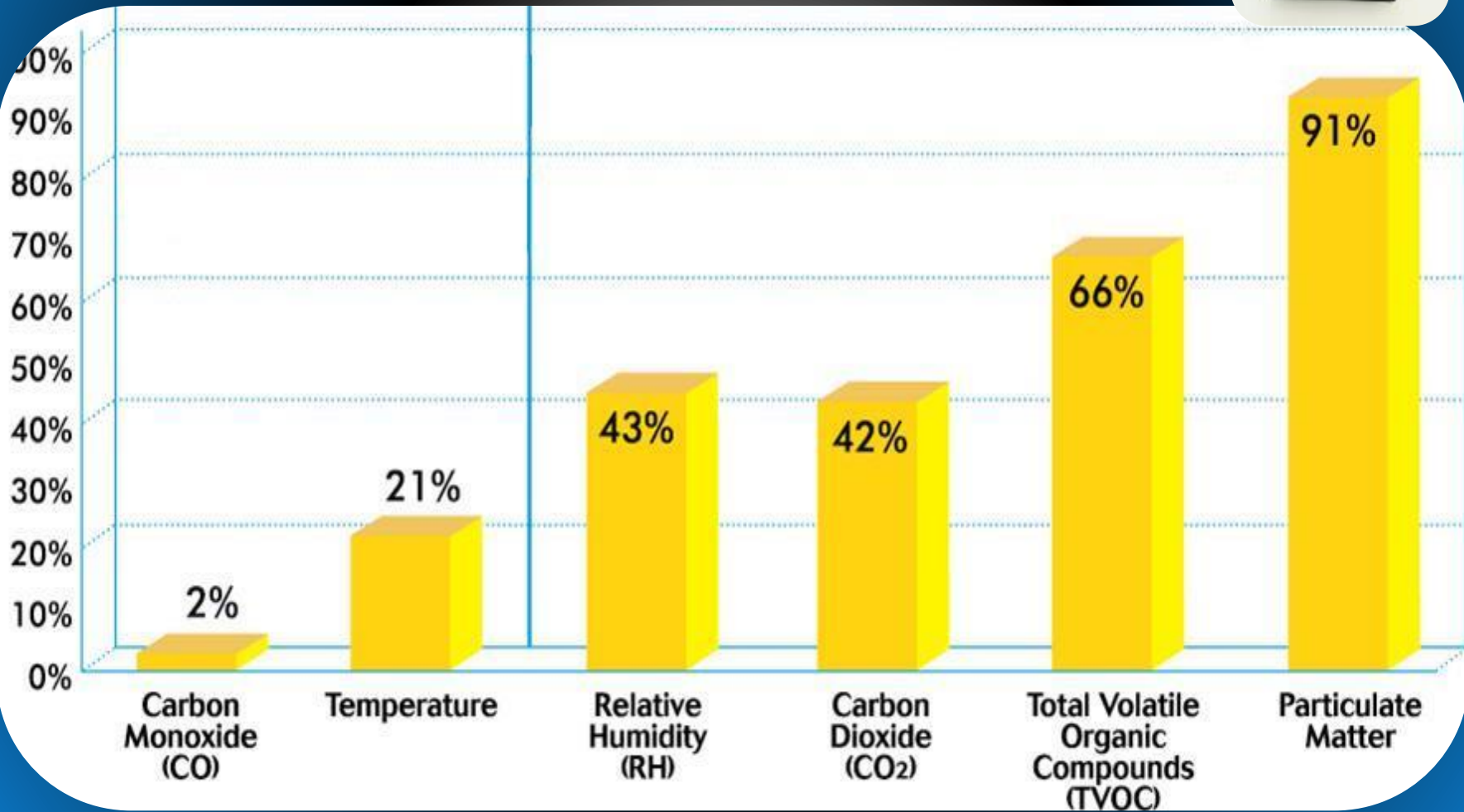


Missing or Insufficient Insulation



AirAdvice[®] Data

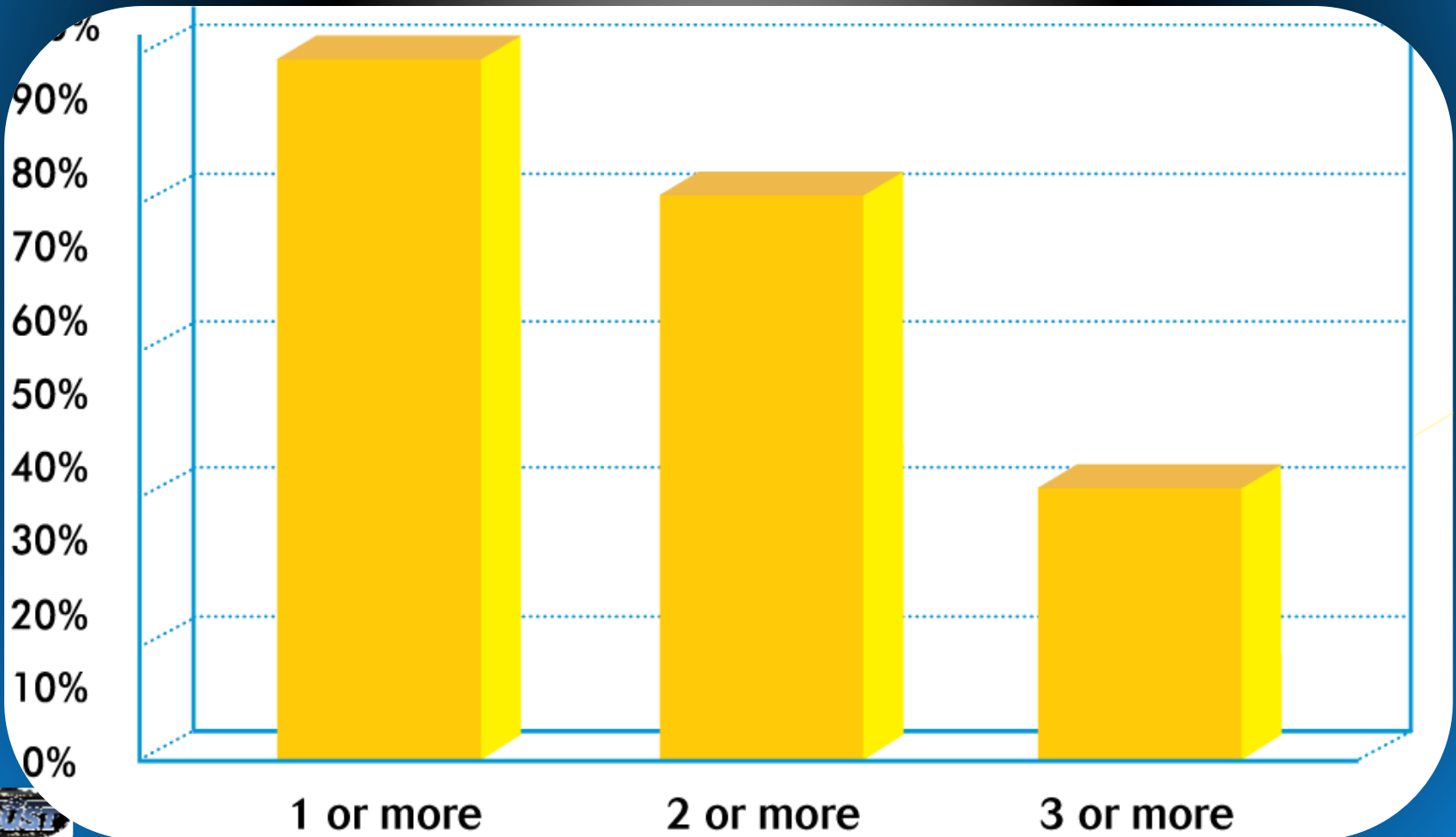
Frequency of Specific IAQ issues



Nearly 80% of Homes Have Two or More Problems



Percent of Homes with 1 or More IAQ issues



Solving Your Customer's Problems

Have you ever replaced just the equipment, and the customer still had comfort, health and/or high energy bills complaints?



What are we selling?

What is the customer buying?

**Customers buy *solutions*
to *their* problems.**



TRUST® Sales Process



*Creating solutions for your
customers begins with your sincere
interest in helping them.*



***Giving your customers choices will
show them that you respect their
ability to make a choice.***



The choices you offer are based on the problems you discovered by:

- *Asking questions*
- *Surveying the home and the system*
- *Taking appropriate measurements*



Engaging customers in the discovery process will create their ownership of your proposed solutions.



TRUST[®] Process for Creating Choices

Problem + Cause + Consequence = Choices

1. Find a **problem**
2. Explain what **caused** it
3. Tell them the **consequence** of not fixing it
4. **Ask** *if they would like to know what their choices are to fix it*



What Are Your Customers' Problems

- ✓ **Hot and cold spots**
- ✓ **HIGH energy bills**
- ✓ **Allergies**
- ✓ **Excessive noise**
- ✓ **Reliability concerns**



Benefits from Solving Problems

- ✓ **More Comfort**
- ✓ **Save Energy and Money**
- ✓ **Healthier**
- ✓ **Quieter**
- ✓ **Peace of Mind**



What Are Your Customers' Problems

- ✓ **Comfort: Hot** and **cold** spots or drafty
- ✓ **HIGH energy bills**
- ✓ **Allergies or indoor air quality**
- ✓ **High or low humidity**
- ✓ **Water infiltration**
- ✓ **Ice dams**
- ✓ **Excessive noise**
- ✓ **Reliability concerns**



**When the total of ALL of the
BENEFITS exceeds the price...
then the customer will BUY!**



TRUST[®] Sales Process



How Can Energy Efficiency be Part of the Solution?

- **High Utility bills**
 - Save money and energy without sacrificing comfort
 - May have higher upfront cost but offers a better return on investment
- **Environment- Efficiency is better for environment and lowers carbon footprint**
- **Commercial customers**
 - Lower operating costs
 - Helps with sustainability goals
 - A combination of different choices can meet energy, money savings, and carbon footprint goals.



American Standard
 HEATING & AIR
 CONDITIONING



**WELLS
 FARGO**

Wells Fargo Home Projects®

<p>PLATINUM Maximum Efficiency Heating and Cooling</p> <p>Package Details...</p>	<p><i>Most Comfortable</i></p> <ul style="list-style-type: none"> • Greatest Utility Savings • Adapts to the Customer • 10-Year 100% Parts and Labor Warranty • 100% Satisfaction Guarantee 	<p>\$ 353 /mo* 9.99% APR Until Paid in Full, 1.25% min pmt \$ 28,201</p>
<p>GOLD Upgraded Efficiency Heat/Upgrade Cool</p> <p>Package Details...</p>	<p><i>Very Comfortable</i></p> <ul style="list-style-type: none"> • Excellent Utility Savings • 2 Stage Heating and Cooling • 10-Year 100% Parts and Labor Warranty • 100% Satisfaction Guarantee 	<p>\$ 218 /mo* 9.99% APR Until Paid in Full, 1.25% min pmt \$ 17,439</p>
<p>SILVER Minimum Efficiency Heat/Upgraded Cool</p> <p>Package Details...</p>	<p><i>Excellent Comfort</i></p> <ul style="list-style-type: none"> • Good Utility Savings • 2-Stage Heating 1-Stage Cooling • 10-Year Parts and 1 Year Labor Warranty • 100% Satisfaction Guarantee 	<p>\$ 138 /mo* 9.99% APR Until Paid in Full, 1.25% min pmt \$ 11,014</p>
<p>BRONZE Minimum Efficiency Heating / Cooling</p> <p>Package Details...</p>	<p><i>Comfortable</i></p> <ul style="list-style-type: none"> • 1-Stage Cooling, 1-Stage Heating • 1-Stage Heating 1-Stage Cooling • 10-Year Parts and 1 Year Labor Warranty • 	<p>\$ 97 /mo* 9.99% APR Until Paid in Full, 1.25% min pmt \$ 7,787</p>

PLATINUM SYSTEM: COMFORT ASSURANCE PACKAGE

These items are included in the price...

- Adaptive Intelligent Heating & Cooling System
- Upgrade & Replace the Entire Duct System
- Upgrade & Renovate the Existing Duct System
- Add Return Air
- Comfort Net Control System with WiFi
- SecureAire Air Purification System
- Clean Comfort Whole House Dehumidifier
- Reme BLU QR UV Stick
- 2 Year Comfort Agreement Membership
- Quality Inspection

\$ 355 per month ON APPROVED CREDIT



Thermostats and Controls

[+ See More](#)



Service and Maintenance

[+ See More](#)



Indoor Air Quality Solutions

[+ See More](#)

Rebates & Adjustments \$ % % Apply to all packages

\$ 26,909

[Save Proposal](#)





Indoor Air Quality Solutions

Provide healthy and clean air quality and reduce allergens with these options

SecureAire Air Purification System	\$ 2,632	✓	<i>Included</i>
Whole House Air Duct Cleaning	\$ 1,311	✓	<i>Included</i>
Honeywell High Efficiency Air Filter	\$ 626		\$ 7 / month
Ultra-Violet Coil Sterilization System	\$ 1,042	✓	<i>Included</i>
Whole-House Dehumidification System	\$ 3,947	✓	<i>Included</i>
Whole-House Powered Bypass Humidifier	\$ 1,289		\$ 15 / month
Whole-House Bypass Humidifier	\$ 942		\$ 11 / month



Thermostats and Controls

Increase your home's efficiency and comfort level with these options:

Upgraded WiFi Touchscreen Thermostat	\$ 205		\$ 2 / month
Ecobee Thermostat	\$ 416	✓	<i>Included</i>
NSI Carbon Dioxide Monitor	\$ 521	✓	<i>Included</i>
3-Zone Comfort Controller	\$ 2,000		\$ 24 / month
Surge Protector for Furnace	\$ 184	✓	<i>Included</i>
Surge Protector for AC Condenser	\$ 184	✓	<i>Included</i>

\$ 353 per month ON APPROVED CREDIT

\$ 28,201





Service and Maintenance

Protect your investment and get peace of mind with these options:

1-Year Maintenance Program	\$ 200		\$ 2 / month
3-Year Maintenance Program	\$ 600		\$ 7 / month
5-Year Maintenance Program	\$ 1,000	✓	<i>Included</i>
5-Year 100% Parts and Labor Warranty	\$ 737		\$ 9 / month
10-Year 100% Parts and Labor Warranty	\$ 1,263		\$ 15 / month
12-Year 100% Parts and Labor Warranty	\$ 1,579	✓	<i>Included</i>

\$ 353 per month ON APPROVED CREDIT

\$ 28,201



System Selection Recap

This proposal serves as a recap of estimated price and configuration of the selected system. Please call to receive a formal sales and purchase agreement.



License#1234
 Anytown, USA
 (888) 321-HEAT
 sales@mycompany.com

Proposal Date: March 30, 2019
Proposed By: tom
Proposal ID: 02
Cust. Name: Lone Ranger
Cust. Address:
Cust. Phone:
Cust. Email:

Gold System Comfort Assurance Package

System Type: Split System AC with Gas Furnace (a)
System Size: 3.0 Ton
System Efficiency:
Job Notes:


Base Features Included in Package

- ▶ High Efficiency, More Comfort
- ▶ Classic Plus Series 2
- ▶ Two Stage Operation
- ▶ Quieter Fan
- ▶ 10 Year Parts / 5 Year Labor Warranty

Additional Features & Accessories

- ▶ Upgrade and Air Seal Existing Duct System
- ▶ 10-yr Parts and Labor Warranty
- ▶ 2 Year Precision Tune-Up
- ▶ FocusPRO® 6000 programmable T-stat
- ▶ Honeywell Digital Programmable Thermostat
- ▶ Nest Protect Smoke/Carbon Monoxide Detector
- ▶ AprilAire Electronic Air Cleaner
- ▶ AprilAire Model 700 High-Capacity Humidifier

Total System Price: **\$15,828**

Monthly Payment: **\$209**

Loan Terms: 9.95%, 120 mo. installment

Loan Promo Code: RBT

Dealer #



*The offer of financing is subject to credit approval by the lender. The monthly payments and terms displayed are approximate and may vary from the actual. Rely on the lender's contract terms, conditions, and documentation for details. Equal opportunity lender.





Sell Yourself

- ✓ 1-Stop Shop
- ✓ Licensed
- ✓ Bonded
- ✓ Satisfaction Guaranteed

Sell Your Company



Sell a SOLUTION to your customer's problems





MAGIC™

ELECTRIC + PLUMBING
HEATING + AIR

Believe in Magic



We have built one of the most trusted names in home service in Southern Idaho.



**We Support Our
Community**



- **Clean Uniforms**
- **Friendly Technicians**
- **Combined over 100 years of experience**
- **Certified Technicians**





We Respect Your Home



MAGIC™

ELECTRIC + PLUMBING
HEATING + AIR



BONDED



LICENSED



INSURED



MAGIC[™]
ELECTRIC + PLUMBING
HEATING + AIR

SATISFACTION GUARANTEE

If you are not completely happy with your system and cannot fix it, we will remove it and refund your money.

We stand behind our work 100%.

REFERRAL PROGRAM

Referral Gift

For every friend, neighbor, or relative you refer to us that uses any of our services,
we will send you the following gift:

\$50 for a new Comfort System \$25 for Services

Referred Name: _____

Address: _____

Please by (_____) _____, morning (_____) _____

Your Name: _____

Our purpose is to provide excellence in all areas
of service to our customers.

***We Offer
Rewards for
Referrals!***

Offering Choices



What solutions do you offer?

- 🌐 HVAC/mechanicals (heating and cooling)
- 🌐 Indoor Air Quality (testing and mitigation)
- 🌐 Duct Sealing
- 🌐 Air Sealing and Insulation
- 🌐 *Do you have a network of partners who you can refer customers to for work you do not do?*

🌐 www.nicorgas.com/findacontractor



Energy Efficiency as a Viable Choice

- Summarize the cost- and energy-saving benefits
- Demonstrate knowledge of grant and incentive options
 - Utility, manufacturer and government rebates
 - Tax credit options
- Show additional funding options like Nicor Gas On-bill Financing when rebate eligible equipment is installed
 - Nicor Gas has Energy Efficiency loans at 8.99%
 - No fees to customer or contractor
 - Paid through Nicor Gas bill

Inflation Reduction Act (IRA)

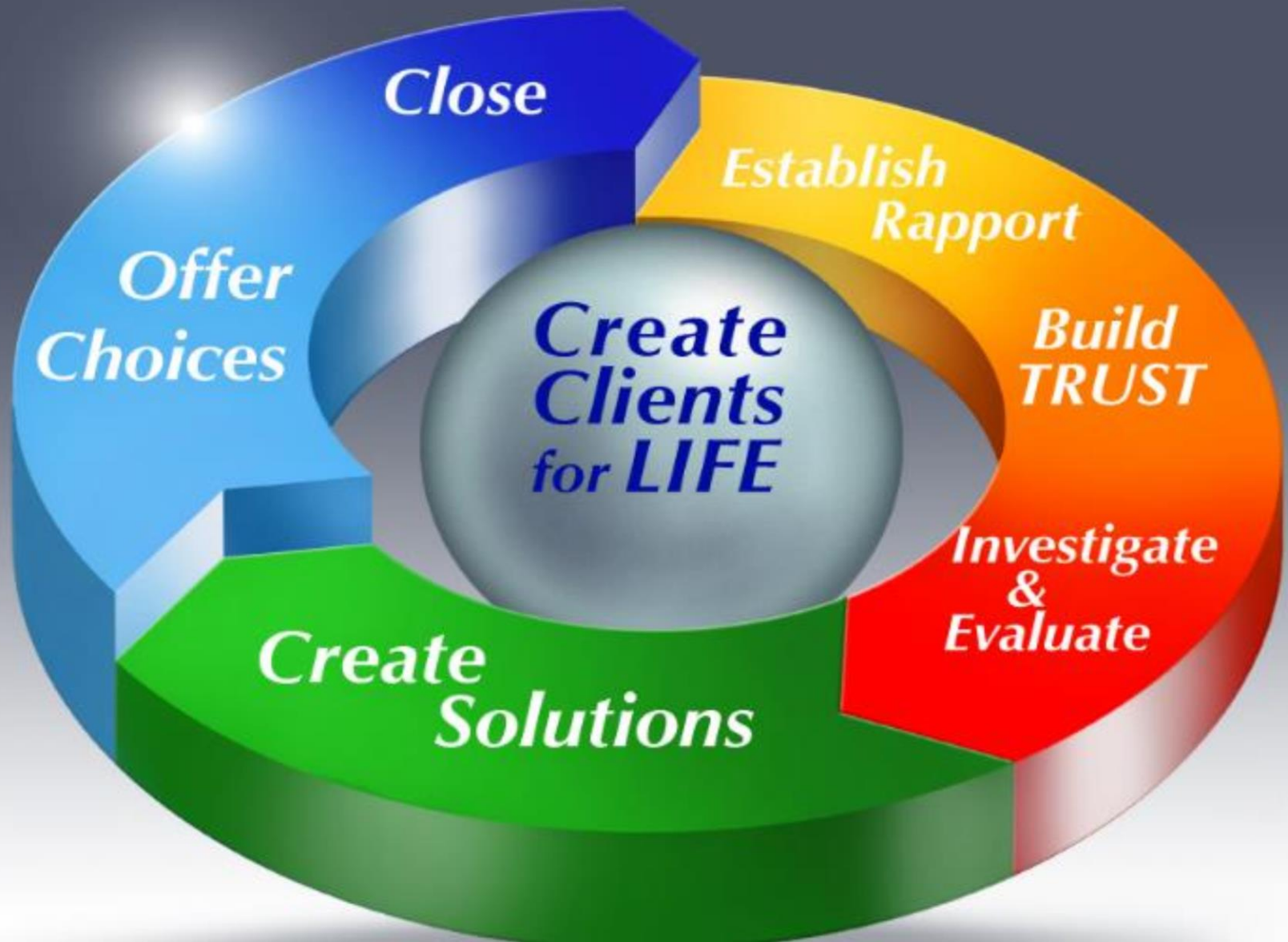
- May be eligible for up to \$1,200 in federal tax credits per year for residential
- Eligible items may include some heating equipment and air sealing and insulation projects

Qualifying Equipment and Projects



- For more information and to apply:
 - [nicorgas.com/ira](https://www.nicorgas.com/ira)

TRUST[®] Sales Process



Summarize the Problems

Everything that you heard.

Everything that you saw.

Everything that you measured.



Customer Summary

Customer Name(s) _____ Date of Survey _____

Customer Summary				
Noisy indoors when the system is running	<ul style="list-style-type: none"> Master bedroom. Furnace oversized Family room Other. Inadequate Return Air Other 			
Outdoor system noise is objectionable	<ul style="list-style-type: none"> Master bedroom Family room Typical of Old Equip Other 			
Trouble getting heat to these rooms:	<ul style="list-style-type: none"> Master bedroom Family room Other 			
These rooms are hot in the summer:	<ul style="list-style-type: none"> Master bedroom Upstairs Furnace Oversized Other Inadequate Return Air 			
Indoor pollutants cause occasional allergies	<ul style="list-style-type: none"> Dust Pollen Daughter Suzie 			
Concerns about airborne contaminants	<ul style="list-style-type: none"> Virus Bacteria Family VOCs 			
Have these occasional indoor odors	<ul style="list-style-type: none"> Pets Fido Chases Skunks Cooking Other 			
Dryness in the winter causes problems:	Dry skin	Allergies	Feel cold	Antiques
	Wood	Painting	Piano	Guitar
Get a cold "clammy" feeling in the summer	<ul style="list-style-type: none"> Downstairs Rec Room Main floor No Return Air Upstairs AC Oversized 			
Would like to reduce high utility bills	Significantly Paying Too Much			
Had heating or cooling repairs	<ul style="list-style-type: none"> Furnace Air conditioner Other _____ 			
Excessive moisture causing unidentified bacterial growth problems	<ul style="list-style-type: none"> Furnace air blower Indoor air conditioning coil Ductwork Crawl space Windows 			





Explain What's Next

It will take me about 20 minutes to put everything together. I'll start with the load calculation, which tells us what size of equipment and ductwork are needed. Then, I'll calculate the utility savings you might be able to get. That will give me enough information to show you some choices to consider.

Is all of that okay?



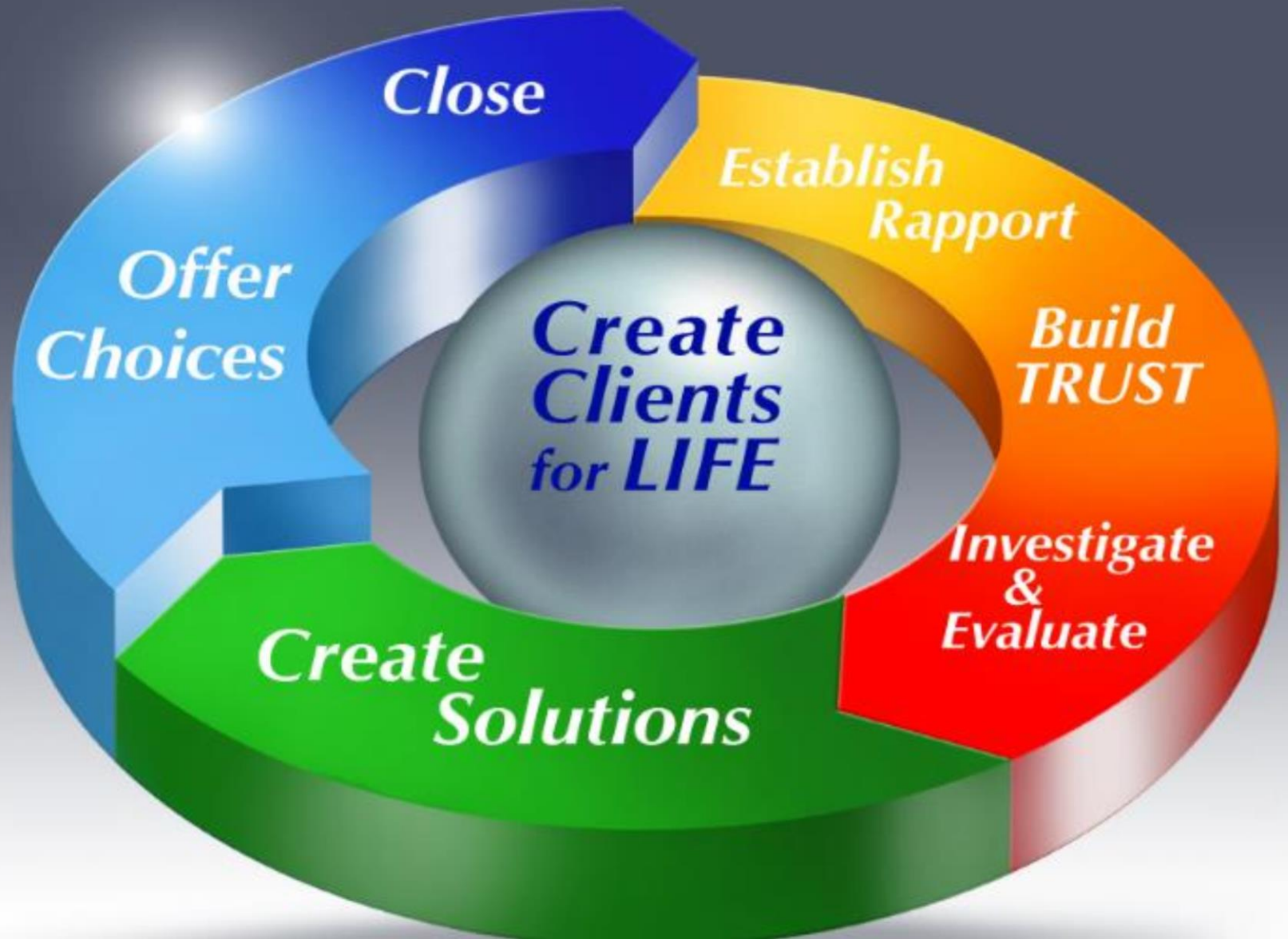


Prepare the Presentation

- Clear off your workspace.
- Put the Proposal in a folder.
- The folder is pre-loaded with information, assuming the sale is made.
- iPad is set with a photo review of problems and a Company Presentation.
- The Summary of “problems” is neatly printed and on top of the folder.



TRUST[®] Sales Process



Closing the sale

Timid salespersons have skinny kids.

Zig Zigler



The Six Sales Behaviors that Create Extraordinary Sales Results:

1. Asking for the sale





Handling Objections

"I can't make a decision today"

"I can't commit without talking to my husband first"

"I don't want to spend more than I planned"

"I can't afford any of them"

"The other bids are lower, what's the difference?"

"Isn't there anything you can do about the price?"

"Everyone says I should get three bids"

"Can't you just fix it for now?"

"If I buy the equipment, will you install it?"

"I found it cheaper online, will you install it?"

MAIN MENU



Follow Up...Until They Say Yes or No!

When you have earned the right to ask for the sale, you have also earned the right to follow up.

Create an agreement with the customer for follow-up.

First Call-Follow Up-Referral Income				
	First Call Close Rate	Follow Up Close Rate	Referral Rate	Total Close Rate
Close Rate				0%
Percent of Annual Income	#DIV/0!	#DIV/0!	#DIV/0!	Total Annual Income
Annual Income	#DIV/0!	#DIV/0!	#DIV/0!	\$ 100,000



Clients-for-Life



Post-installation followup





- 1-2-3 Day Workshops
- One-on-One Coaching
- tom@sellingtrust.com
- www.sellingtrust.com



Questions?



Thank You!

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Energy
Efficiency
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