

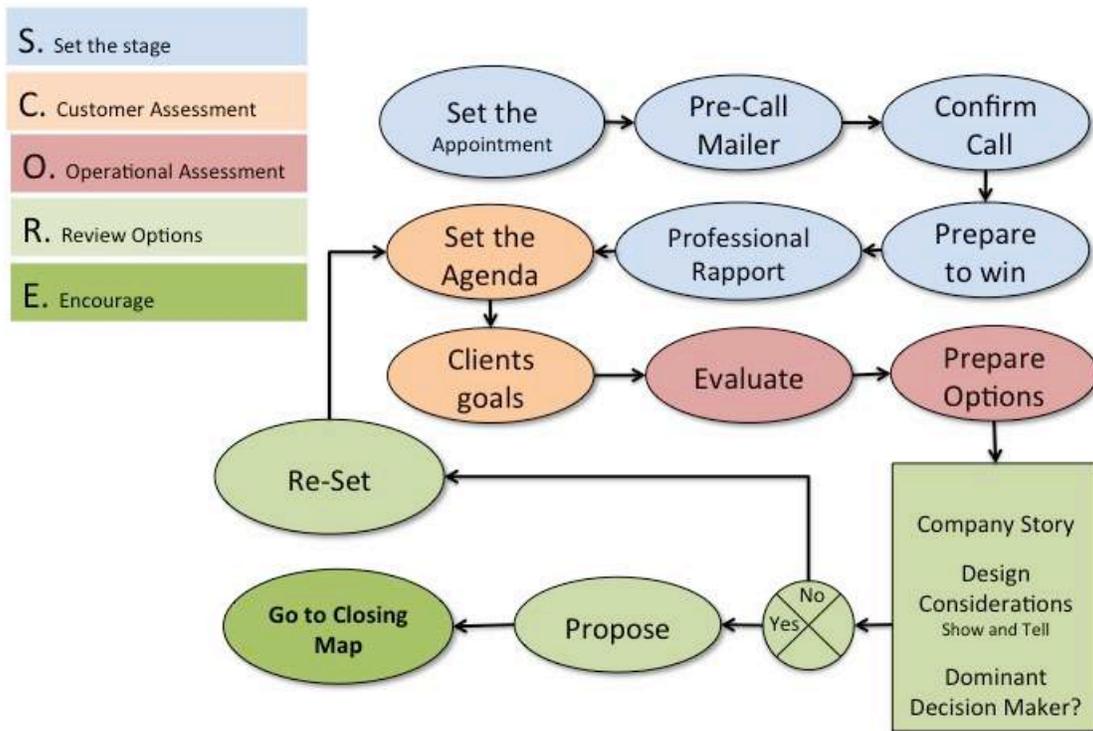
# Chapter 1 S.C.O.R.E

## Residential Replacement Sales Process

### Quick Script

Prototype V 1  
1/19/2015

#### Replacement Sales Process



There are five steps to the Replacement Sales and Closing process:

**S. Set the stage:**

Inspire Trust and Confidence.

**C. Customer Assessment:**

Find out what your customer wants.

**O. Operational Assessment:**

Align wants with the right products and services.

**R. Review Options:**

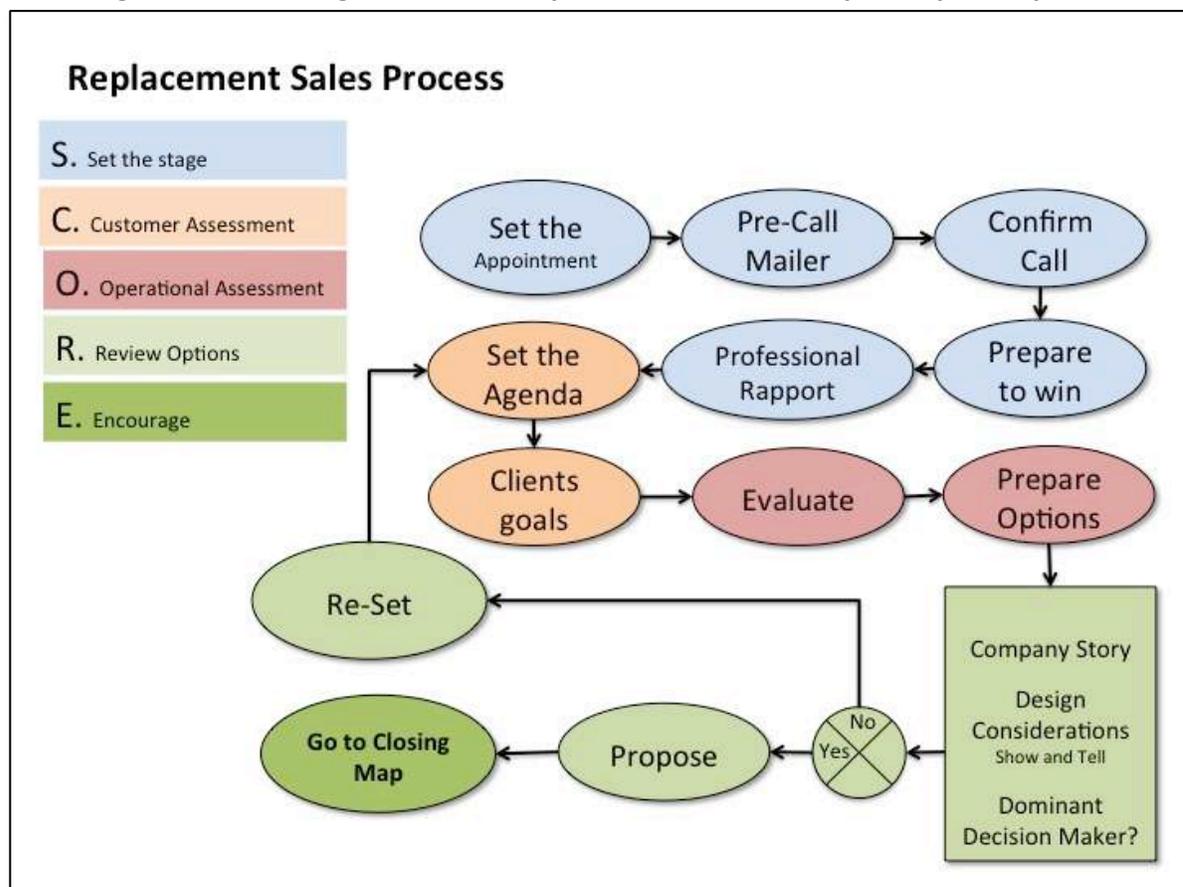
Give your customer every reason to buy from you.

**E. Encourage:**

Encourage them to make decisions that are in their own best interest.

Each step is accomplished by implementing a well defined and orchestrated series of strategies and ultimately, win more sales.

When your customers see and hear that you understand all of the facts, their situation and can clearly communicate how you're going to solve their problem they will feel good about doing business with you and be more likely to buy from you.





“Thank you for calling HVAC Learning Solutions, My Name is Tom Wittman, How can I help you this afternoon?”

“I was wanting to get a price on a new furnace and air conditioner”

I can help you with that; I just need a little information from you first,  
Your Name?

Best number to reach you at?

Street address?

Ok, thanks for the information, now tell me more about what you want to accomplish by replacing your heating and air-conditioning system.

Interesting, are you completely with out heating or cooling at this time?

How soon were you planning on scheduling the work?

What type of heating system do you have? Is it gas, electric or oil?

And roughly how old is your system?

Do you have a boiler or does the heat blow air out of vents?

OK, would there be anyone else interested in the design of your new system?

It looks like we have a few openings, our on site evaluation generally takes about 60 to 90 minutes; I have Joe available this afternoon after three or tomorrow or first thing in the morning. What works best for you?

Ok, Great.

By the way, I don't see your address in our records, what was it that prompted you to call us?

Neighbor? What's their name, I would like to send them a thank-you card.

Ok, Joe will see you tomorrow afternoon between three and three-thirty. You're really going to like Joe, he's been designing systems for the last 15 years and our customers think he's great.”

Lets review the incoming sales appointment script:

- Answer the phone within the third ring with a smile in your voice.
- Always take the position of “We can help you with that” and “Yes we can”.
- Never focus on what you can't do for them. Always focus on what you can.
- Obtain the customers contact information.
- Get the customer talking about what they want.
- Determine the level of urgency.
- Schedule the appointment.
- Position the Comfort Advisor as “One of the Best”.

(Sales Lead Coordinator completes the Replacement request Form and tracks the lead to final disposition)

“I would like to e-mail you a quick 12 question yes – no pre visit survey for you to review with Joe when he arrives. It would be helpful if you would look it over before he arrives to see if you have anything in common with the list. I’ll also include some basic information about Joe and a link to our Facebook page where you can look for coupons and special offers that might apply. May I have your email address so I can forward the information to you this afternoon?

Thank You. Is there anything else I can do for you this afternoon?

Again, my Name is Tom Wittman and I’ll be your customer service contact if you need any further assistance, ok? Have a great afternoon.”

Review:

- Position the Pre-Call Mailer.
- Direct the Customer to your web site or Company Facebook to look for offers or coupons that might apply to them.
- Ask if there is anything else you can help them with
- Re-state your name and tell them too contact you if they need any further assistance.

<h2 style="margin: 0;">Replacement Request Form</h2>	<input type="checkbox"/> Lead Set <input type="checkbox"/> Presentation Made Sold <input type="checkbox"/> Not Sold <input type="checkbox"/> Install Date _____ <input type="checkbox"/> Happy Call Made	Call summary and comments   
	Sales Manager _____ Comfort Consultant _____	
Taken By: _____ Date _____ Appt Date _____ Name _____ Appt Time _____ Address _____  City _____ State _____ Zip _____ Phone (home) _____ Phone (daytime) _____	Time _____ AM _____ PM  <input type="checkbox"/> Equipment Residential <input type="checkbox"/> Equipment Commercial <input type="checkbox"/> Duct Cleaning/Sanitizing <input type="checkbox"/> Service Agreement Residential <input type="checkbox"/> Service Agreement Commercial <input type="checkbox"/> Accessory <input type="checkbox"/> Other	Comments   
Special Instructions:		
Source: <input type="checkbox"/> Tech <input type="checkbox"/> Installer <input type="checkbox"/> Co-Worker <input type="checkbox"/> Cust Referral <input type="checkbox"/> Newspaper <input type="checkbox"/> Radio <input type="checkbox"/> TV <input type="checkbox"/> Yellow Pages <input type="checkbox"/> Direct Mail <input type="checkbox"/> Telemarketing	<input type="checkbox"/> Home Show <input type="checkbox"/> Internet <input type="checkbox"/> Other	Appointment time: _____ Comfort Consultant _____ Actual Preso Date _____ Investment _____ Disposition <input type="checkbox"/> Sold <input type="checkbox"/> Not Sold <input type="checkbox"/> Re-Set Date _____  Follow Up: Date _____ Time _____ By: _____ Happy Call: 1 2 3 4 5 6 7 8 9 10 Comments  <input type="checkbox"/> Sold <input type="checkbox"/> Not Sold

The objective of the pre-call survey is to get the customer thinking about the things they want to accomplish with their new system beyond just replacing the system.

**Pre-Call Survey Example:**

<p><b>Your Log Here</b> <b>Your contact information Here</b></p>
<p><b>12 Common Health Safety &amp; Comfort Issues that our Company can improve for you.</b></p>
<p><b>Do you have anything in common with this list?</b></p>
<p>..... Rooms difficult to heat and cool</p>
<p>..... Uneven temperatures</p>
<p>..... Rooms too hot or cold</p>
<p>..... The home becomes uncomfortably warm before the air-conditioning system turns on</p>
<p>..... The home becomes uncomfortably cold before the heating system turns on</p>
<p>..... Excessive dust in the home</p>
<p>..... Allergy, Hay Fever or Asthma symptoms</p>
<p>..... The home feels muggy and clammy on warm humid days and nights</p>
<p>..... The home feels dry and drafty on cold winter days and nights</p>
<p>..... High fuel or electricity bills</p>
<p>..... Excessive noise</p>
<p>..... Dirt or condensation around registers or grills</p>

Often times, the customer will connect with two or three items on the list. When they do, you have an opportunity to get them talking about their favorite subject: (what they want)

## Example Employee Profile:



**Associate Profile**

Tom Wittman  
HVAC Business & Sales Coach

**Lives in Carmel, Indiana**  
Married to Carol Wittman for 30 Years and has two children, Andrea Smith and Joel Wittman.

**Experience:**  
Obtained HVAC Bachelors degree in 1983.  
Acquired Residential and Commercial HVAC License in 1992.  
Served as an Installer, Service Technician, Comfort Advisor and General Manager for over 20 years and has been indirectly involved with building several successful businesses through consulting, training, structuring and coaching since 2002.

**Hobbies include:**  
Residential home remodeling, Hiking, Bicycling, Reading and Enjoying life.

**Associations:**  
Proud partner of the HVAC Learning Solutions Team  
Active participant in several faith based community service groups in the Central Indiana area.

**Favorite pastime:**  
Spending time with family and friends and helping people get what they want.

The employee Profile serves as a credibility builder and gives your customer an opportunity get a sense of character. You want your customer to look forward to meeting you. The profile is another opportunity to connect on a personal level before you arrive.



Your confirmation phone call will give you an opportunity to introduce yourself and get a feel for your customer's personality. Is your customer controlling or introverted? Are they loud or quiet? Do they speak with a lot of animation and volume in their voice or are they withdrawn and reserved?

Paying attention to these things and reflecting their behavior and mannerisms will help you connect with your customer on a personal level.

You will of course want to ask if they received the e-mail and had a chance to review their checklist. If they did not have a chance to, now is your opportunity to ask them to do so before you show up. If they did have a chance to review the checklist, ask if they had anything in common with it.

Often times, this will start some very productive dialogue and encourage your customer to begin speaking to you about what they want.

Good afternoon,

"Tom Wittman from your heating and Air Conditioning Company is this (ask for the customer)? I wanted to confirm our appointment for this afternoon at three. Is that time still ok? Great. "

"(Sales Lead Coordinators name) from the office said that you were having some issues with (whatever they indicated to the SLC), is that correct?"  
Tell me more about that"

LISTEN

"We see situations like yours all the time. Once we've had a chance to look things over, I'm sure we'll have a few options to help with that, ok?"

"I have one call ahead of you and will call when I'm on the way."



## Appearance & Dress:

- Well Groomed.
- Hair cut neatly, above the collar.
- No facial hair is preferable, however, if facial hair is a must it should be well groomed at all times.
- No exposed body piercing jewelry.
- Jewelry in general should be kept to a minimum.
- Dress for the area. The safest attire is casual professional.
- Casual dress pants (*navy blue, gray or tan-no blue jeans*)
- Golf sport company logo shirt or dress shirt (*NO tee-shirts*) (*no symbols, decals or logos other than a company logo.*) *Shirt should be kept neatly tucked in at all times.*
- Tie and or sport coat if appropriate.  
(*You will rarely make a bad first impression by dressing too professionally.*)
- Work boots, work shoes or dress shoes, black or brown, clean and polished at all times (*no tennis shoes*).
- Socks should match the color of pants, shoes or shirt.
- Belt should match the color of shoes or boots.
- Photo name badge with company logo attached to the left front pocket of shirt.
- Perfume, after-shave, cologne or fragrances if used should be used conservatively.
- A breath freshening mint (*no gum*) should be taken prior to meeting the prospect.
- Refrain from smoking, the smell of cigarette smoke can be very offensive to customers.
- Comb your hair, look at your appearance in a mirror and make sure that your appearance reflects the professional company you represent prior to meeting your future customer.

- Check-up from the Neck-up!
- Positive mental attitude!
- Be where you are...mentally, physically and emotionally. (Turn off your telephone!)
- Look, act, and behave like a professional.
- Walk with a purpose (Put a spring in your step!)
- Respect your customer's personal space.
- Smile. A smile helps set the tone for the rest of the visit.
- Have a confident presence about you. Confidence commands respect.
- Develop a good rapport by asking questions. Questions condition people to listen, pay attention, draw conclusions and engage in conversation.
- Flex your behavior and tone to match your customers. People feel comfortable with and like people who are like them.

### **First Impression**

1. Show up two to three minutes early.
2. Be sure to park out of the way.
3. Turn your cell phone off.
4. Avoid walking on the Customer's lawn.
5. Commit the Customer's name to memory and be prepared to use it generously.
6. Knock on the door at the exact time of the appointment.
7. Set the tone of the visit by smiling.
8. Stand to the side of the door and give the Customer space.
9. Speak clearly and confidently.
10. Use shoe covers!

### **Use a warm and professional greeting**

1. Greet the customer by name
2. Give your name & your company name
3. Show the customer your photo ID.
4. Hand the customer your business card.
5. Wait for the customer to offer his/her hand.

### **Greet your customer:**

"Good afternoon, I'm (Name) from (Company Name). Nice to meet you."

Hand the customer your Business card

Wait for the customer to offer his or her hand to shake

'Is my vehicle parked out of the way?'

"May I come in? (Put on your shoe covers)"

### **Test the waters with a compliment:**

"This is a wonderful neighborhood." Do you enjoy living here?

"This is a beautiful property." Have you lived here long?

"I expected to find a much older person owning a fine home like this."

Congratulations! Do you enjoy the neighborhood?"

"Your landscaping is beautiful. Who does your work?"

Their reaction to these types of question will give you a clear indication of their dominant personality style and mood:

- Direct or Indirect
- Controlling or Flexible
- Open or Self-Contained
- Animated or Withdrawn

**Pay attention** to their style.

**Flex your behavior** and tone to match your customers. People people who are like them. And don't forget to set the mood by smiling.

**Determine why you are there.**

"Tom from the office said that you were interested in replacing your system, is that correct?"

**Ask questions to keep your customer talking** about their experience.

"What prompted you to call us today?"

"What are you hoping to accomplish by replacing your system?"

Listen to them closely. Use follow up questions to get the customer talking about their experience:

"Tell me more about that."

"How long have you been dealing with this situation?"

'How So?"

Or restate what they said in the form of a question.

People generally like to talk about themselves and their experiences more than anything else and as you know, every sales call is all about your customers' experience and wants... Not yours. The more you listen and acknowledge your customers situation, the quicker you will inspire Trust and Confidence from them because they really don't care how much you know until they know how much you care about them!

Getting your customer talking about their experience in the home will quickly draw your customer closer to you making it easier to establish "Common Ground" and develop good professional rapport.

After you've established good professional rapport with your customer, take control of the process and go to the Customer Assessment step.

**Transition to the Customer assessment**

" The good news is that Our Company has helped a-lot of customers with situations just like yours. I'm confident that once I've had a chance to evaluate the condition of your system and the installation, we will be able to help you with these things." Ok?



## Time Commitment

"This will take about 60 to 90 minutes, are we ok on time?"

## Establish a place to work

"Would there be a kitchen table or counter I can use as a workspace to put together our results and recommendations?"

## Explain today's agenda

(As you and the customer are walking to the place to work)

"I'll need access to the attic, Crawlspace or Basement and other areas of your home, is there any area of the home you prefer I not go into?"

"It will take me about 20 minutes or so to look everything over and then, I'll need about 10 to 15 minutes to put everything together for us to review."

## Transition into establishing "Client Goals"

"To make sure I don't miss anything that might be important to you, I need to ask a few more questions, Ok?"



You should be prepared with a pad-folio: The left side of the pad-folio would be the questionnaire and the right side would be a yellow note pad where you can neatly write down your customers list of goals.

(Make sure to let your customer see what you are writing).

**General Information**

Would anyone else be interest in your new system? .....

How long have you lived here? ..... How long do you plan on staying? 1-2 3-6 7-10 Longer?

Have you ever invested in an HVAC system before? Y N

**12 COMMON ISSUES THAT CAN BE IMPROVED WITH A PROPERLY DESIGNED HVAC SYSTEM.**

DO YOU HAVE ANYTHING IN COMMON WITH THIS LIST?

..... Which rooms are difficult to heat or cool?

..... What areas have uneven temperatures?

..... Where are the hot or cold spots in your home?

..... How humid is your home in the summer?

..... How dry is your home in the winter?

..... How often do you have to dust?

..... Who in your home has Allergy, Hay Fever or Asthma symptoms?

..... What was your highest heating bill?

..... What was your highest cooling bill?

..... What would an average bill be?

..... Where do you notice excessive noise from your system?

..... Which registers or grills accumulate Dirt or condensation?

**HVAC System Features and Programs**

If you were to pick three, what would they be?

..... Extended warranties. .... Low cost of ownership. .... Low operating cost

..... Service agreement. .... Financing. .... Hybrid systems

..... Quiet operation. .... Same as cash. .... Specific brand

Why did you pick those three? .....

**What type of budget did you have in mind for this project?**

..... \$4,000.00 to \$7,000.00. .... \$7,000.00 to \$10,000.00

..... \$10,000.00 to \$15,000.00. .... \$15,000.00 to \$18,000 .... Over \$18,000.00

What did you base your budget on? .....

*Notes*

*Goals*

Clients goals

General Information

Would anyone else be interest in your new system? .....
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## General Information

### **Would anyone else be interest in your new system? .....**

When your customer answers this question with a yes, ask for their name, write it down and remember it. We will be involving them in the process later.

Then ask: "Will they be joining us?"

Move onto the next question, regardless of the answer.

### **How long have you lived here? .....**

#### **How long do you plan on staying? 1-2 3-6 7-10 Longer?**

If your customer purchased the home recently, they might not have had enough time to experience any comfort or health issues. You will have to dig deeper during the operational assessment, discover things that may compromise comfort, health or safety and bring those things to your customer's attention during the Review Options steps.

If the homeowner has lived in the home for more than a year, they should have enough time with their home to have experienced any health or comfort issues.

The answer to how long they plan on staying in the home will give you an indication of their interest in a short term equity return on their investment or a longer term return on investment. This in no way should ever prompt you to disqualify them from reviewing all options. Best, Better, Good and Base. Do not pre-qualify your customer. We will review how to let them qualify themselves later in the process.

### **Have you ever invested in an HVAC system before?      Y      N**

If they answer yes to this question, they may have established a budget based upon the system they bought before. Follow up by asking:

How long ago was that?

Wait for their response....

"There have been a lot of advancements with HVAC systems since then, after we determine what size of system your home needs, you and I can review all of the different options until your comfortable with your system and the price, ok?"

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..... What areas have uneven temperatures?

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The 12 common issues questions help you and your customer establish a list of goals. Use common sense. If your customer had already shared some of the things on this list with you earlier, skip those questions, re-visit the issues thy shared with you earlier and then ask the remaining relevant questions.

You should be prepared with a pad-folio: The left side of the pad-folio would be the questionnaire and the right side would be a yellow note pad where you can neatly write down your customers list of goals.  
 (Make sure to let your customer see what you are writing).

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**12 COMMON ISSUES THAT CAN BE IMPROVED WITH A PROPERLY DESIGNED HVAC SYSTEM.**

**DO YOU HAVE ANYTHING IN COMMON WITH THIS LIST?**

..... Which rooms are difficult to heat or cool?

..... What areas have uneven temperatures?

..... Where are the hot or cold spots in your home?

When they tell you that they are having a problem, get them talking about it by using follow up questions and people skills:

“Tell me more about that.”

“How long have you been dealing with this?”

Then, convert their issue into something that you can do.

For example:

“What I’m hearing you say is that you want us to...”

“Make the living room easier to heat and cool.” (Write it down)

“Even out the hot and cold spots.” (Write it down)

“Make the master bedroom warmer in the winter.” (Write it down)

Write it down and repeat it to your customer to make sure that you get it right and make sure your customer is able to see what you are writing down. (Don't hide it).

..... How humid is your home in the summer?

..... How dry is your home in the winter?

Customer: “Yes, it does get humid in the summer and dry in the winter”

Tell me more about that...

How bad does it get...

“If I’m hearing you correctly, you would like to have better humidity control, right?”

“Ok, Maintain better humidity control in your home. Right?” (Write it down)

..... How often do you have to dust?

Customer: “It seems like I’m always dusting”

“If we could reduce the amount of dust in the home, would that be important to you?”

“Ok, Reduce the circulation of dust in the home, right?” (Write it down)

..... Who in your home has Allergy, Hay Fever or Asthma symptoms?

Customer: “My Daughter Andrea”

“How severe are the symptoms?”

“Is it seasonal or consistent?”

Would reducing allergy triggers be an important option for you?

Ok, “Reduce allergy triggers, right?” (Write it down)

..... What was your highest heating bill?

..... What was your highest cooling bill?

..... What would an average bill be?

“Wow, have your bills always been this high?”

“Would lowering your heating and air conditioning operating cost be important?”

“Ok, Lower air conditioning and heating bills, right?” (Write it down)

..... Where do you notice excessive noise from your system?

“Yes, it gets quite noisy outside when we are sitting on the patio”

“Sounds like we should look into making the outside unit quieter, so you can enjoy the patio?”

“Ok, reduce the noise from the outside unit, right?” (Write it down)

By now, you should have established three of four things your customer wants their system to do for them beyond simply heating or cooling their home.

Now, all you have to do is determine how to do it and show and tell them everything they need to see and hear to believe that you can solve everything on their list of goals.

#### **HVAC System Features and Programs** **If you were to pick three, what would they be?**

..... Extended warranties.    ..... Low cost of ownership.    ..... Low operating cost

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..... Quiet operation.    ..... Same as cash.    ..... Specific brand

Next, hand your customer a pen, slide the worksheet toward them and ask them to choose three of the nine additional features they want with their new system.

After they choose, ask

“Why did you choose these three over the other six?”

This conversation will give you valuable insight as to what why these three benefits are important to them compared to the other six. They are telling you what’s important to them! When you put their options together, make sure to include everything they told you they wanted with their new system.

#### **What type of budget did you have in mind for this project?**

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..... \$10,000.00 to \$15,000.00.    ..... \$15,000.00 to \$18,000    .....Over \$18,000.00

What did you base your budget on? .....

The answer to this question will give you valuable insight regarding how much research they have already completed. Did they speak to other HVAC salespeople? Did their neighbors talk to them about their experience when they bought their new

system? Did they search the Internet to obtain budgets? Maybe, they had no idea what a new system would cost in the first place. What are they basing their budget on or did they have any budget in mind at all?

Caution: do not pre-qualify the customer just because they gave you an answer to this question. Customers often times make the decision to spend more money for things they really want. Customers usually buy the things that are brought to their attention and are willing to pay more than they originally thought they would.

For Example:

- Better humidity control
- Dust reduction
- Noise reduction
- Reducing operating costs
- Making areas of the home more comfortable
- Reducing Allergy triggers....

You do however need to be prepared to explain what makes up the price.

### **Keeping your customer in control of buying.**

You are in control of the process. Your customer has to maintain control of buying. When your customer feels like they have no control over a situation, their response may be emotionally charged because of fear; Fear of making a mistake or fear of not having a choice.

Your mission is to keep your customer in control. At this point, if the customer responds emotionally to your question regarding their budget, they're really saying that they feel like they have no control over the price and are afraid of making a mistake. Your job is to put the customer squarely in control of the buying process.

### **Explain what makes up the price:**

"The price depends upon three things. The proper size of system for your home, the type of system you want and how much additional work makes sense for you."

### **Put them in control:**

"I'm not here to sell you anything. But I will let you buy it from me if it makes sense. But before you buy it from me, it has to make sense for you first, right?"

You have complete control over the price based upon the type of system you choose and how much of the additional work makes sense for you.

### **Re-set the agenda.**

How about we quickly review your goals to make sure I'm clear on what you want. Then I'll assess your system, the condition of the installation and put together a few options. Then, I'll show you what I found, explain how we propose to address everything on your list of goals and decide what type of system makes sense for you and how much of the work additional work you want to do now, Ok?"

**Review the Goals:**

“If I heard you correctly, you want to:

Make the upstairs bedroom more comfortable in the winter

Reduce allergy triggers in the home

Minimize the amount of dust

Reduce the electric and gas bill

Is that correct?”

“Would you mind numbering these for me in order of priority?”

“Is there anything not on this list that (the person from question 1) John, your husband would want?”

“If find anything else that has to do with health or safety issues, may I bring it to your attention?”

“Ok, Time to get to work. You are welcome to come along if you like, or we can break apart for 20 minutes or so and I’ll find you when I finish.

I would appreciate it if you could show me where the thermostat, indoor unit, attic access and outdoor unit is, thank you.”

**NOTE:** If your customer decides not to “follow along”, be prepared with some letters of recommendation, testimonials, before and after photographs, Industry news and or product information organized in a professional looking binder for them to “review” while you are completing your assessment.

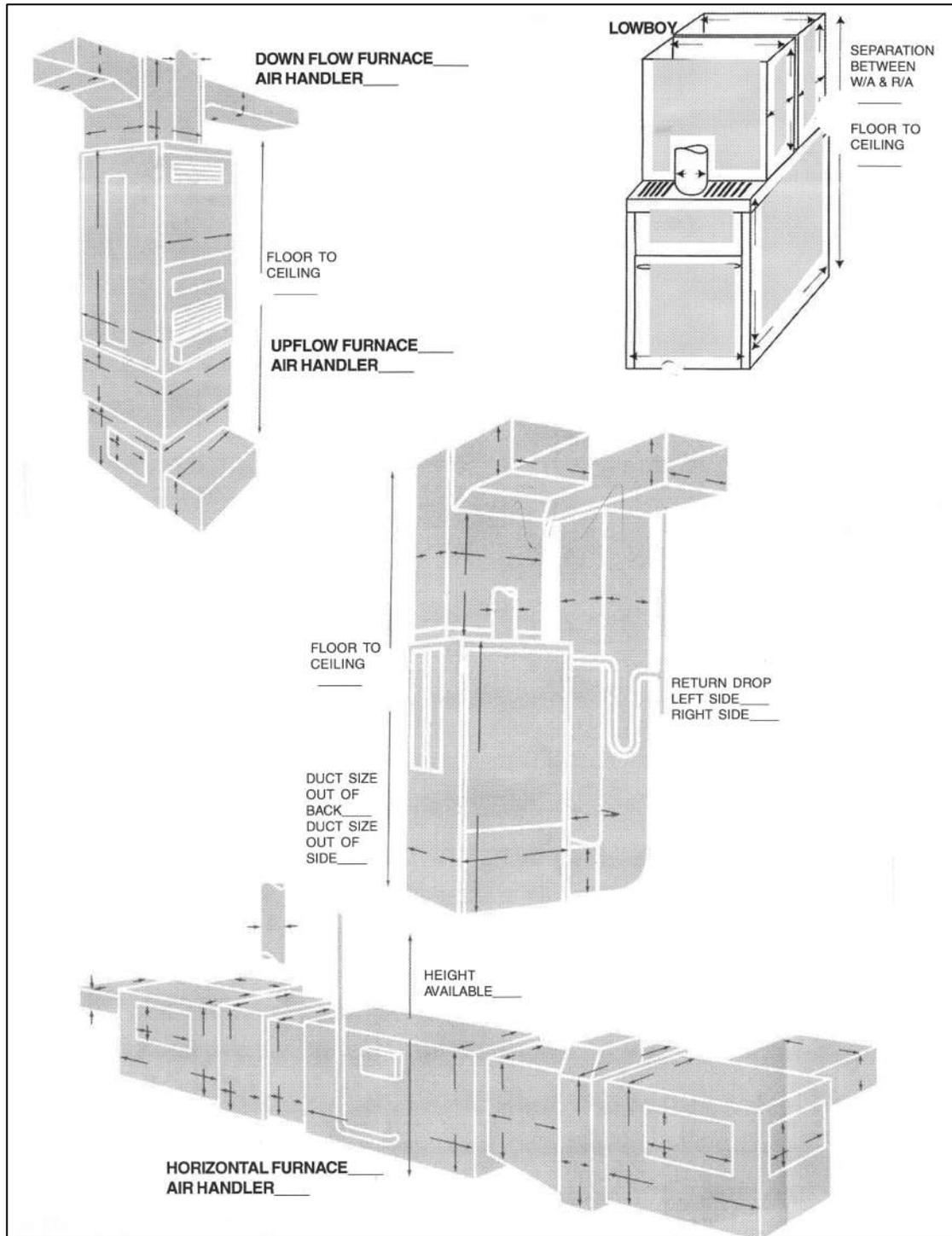
**O. Operational Assessment**

**The operational assessment** is one of the most critical steps in the process. This is where you will evaluate the entire system and determine exactly what it will take to satisfy everything on your customers list of goals by aligning your products, services and additional work with everything your customer wants with their new system.

**Inspect the installation of the indoor unit.**

Determine the system configuration. Document all of the necessary measurements.

Example illustration on next page:



Complete all information pertaining to the existing equipment:  
 Review Equipment Profile on next page:.

Equipment Profile

## EXISTING EQUIPMENT PROFILE

### HOME INFO

Year Built \_\_\_\_\_ # of Stories \_\_\_\_\_ Basement? Yes No  
 Exterior Siding: Brick Block Wood Aluminum Other \_\_\_\_\_  
 Basement: Slab P&B

### HEATING

Type: Loby Upflow Downflow Horizontal Gravity  
 Location: Basement Closet Utility Attic Crawlspace  
 Other \_\_\_\_\_  
 Fuel Type: Natural Gas LP Gas Oil Electric  
 Manufacturer \_\_\_\_\_ Model # \_\_\_\_\_  
 BTU Input \_\_\_\_\_ Efficiency \_\_\_\_\_

### FURNACE ACCESS

Closet: Closet width \_\_\_\_\_ Closet Depth \_\_\_\_\_  
 Door width \_\_\_\_\_ Door Height \_\_\_\_\_  
 Attic: Width of access (stairway to attic  
 between braces) \_\_\_\_\_  
 Crawl: Width \_\_\_\_\_ Height \_\_\_\_\_  
 Depth \_\_\_\_\_

### COMBUSTION AIR

Install Combustion Air Intake? Yes No Size: \_\_\_\_\_

### GAS PIPING

Gas Piping Size? \_\_\_\_\_  
 Connect to existing piping at furnace? Yes No  
 Install gas piping? Yes No  
 If yes - how far? \_\_\_\_\_  
 Is an oil tank to be removed? Yes No N/A  
 If yes, how full is tank? \_\_\_\_\_  
 Install new gas shut-off valve? Yes No

### VENTING

New vent cap? Yes No  
 Chimney liner? Yes No  
 If yes, total BTU's to chimney \_\_\_\_\_  
 If yes, distance to top of chimney \_\_\_\_\_

Existing water heater? Gas Electric  
 Reducer "Y" needed for water heater? Yes No  
 Vent Brand? \_\_\_\_\_

### 90% AFUE CONSIDERATIONS

Intake/Exhaust Termination:  
 If Sidewall, clear of windows & intakes? Yes No  
 Length of PVC run? \_\_\_\_\_  
 Condensate Drain:  
 Length? \_\_\_\_\_  
 Freeze protection required? Yes No  
 Condensate Pump Required? Yes No  
 Other? \_\_\_\_\_

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### DUCTWORK

Furnace on new pad/platform? Yes No  
 Supply air plenum? New Adapt to Existing  
 Install vibration isolator (canvass connectors)? Yes No  
 Return air plenum or drop? New Adapt to Existing  
 Insulate supply air plenum? Yes No  
 Insulate return air plenum? Yes No  
 New filter rack? Yes No  
 If yes, size of new filter rack? \_\_\_\_\_  
 Any new supply or return runs needed? Yes No  
 If yes, has customer approved all opening locations? \_\_\_\_\_  
 If yes, are locations clearly indicated on drawing? \_\_\_\_\_

### ELECTRICAL

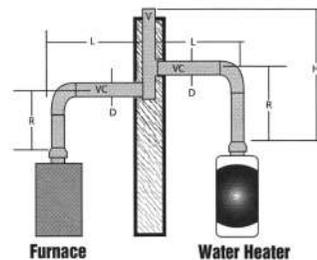
Circuit to furnace? New Adapt to Existing  
 If new, the length of run to electrical panel? \_\_\_\_\_  
 If new, the name of the electrical panel? \_\_\_\_\_  
 New wiring needed to? Humidifier Thermostat EAC Other

### OTHER CONSIDERATIONS

Thermostat? Use existing New: \_\_\_\_\_  
 Humidifier/Air Cleaner? Remove Existing Reinstall None

### WATER HEATER

Water heater? 40 50 Pipe? Copper Galvanized  
 Manufacturer? \_\_\_\_\_ Model # \_\_\_\_\_  
 If Powershot, where is PVC exit? \_\_\_\_\_



D - Diameter H - Height L - Length R - Rise V - Vent VC - Vent Connector  
**Measuring for Combustion Air**

Furnace BTU \_\_\_\_\_  
 HWH BTU in \_\_\_\_\_  
 Other BTU in \_\_\_\_\_  
 Total BTU in \_\_\_\_\_  
 Divide by \_\_\_\_\_  
 Cu Ft Needed \_\_\_\_\_  
 \_\_\_\_\_ X \_\_\_\_\_ = (\_\_\_\_\_)  
 Balance needed \_\_\_\_\_  
 Multiply by \_\_\_\_\_  
 Total add BTU \_\_\_\_\_  
 Divide by \_\_\_\_\_  
 Additional sq in \_\_\_\_\_  
 X for free area \_\_\_\_\_  
 Additional sq in \_\_\_\_\_  
 Divide by 2 grills \_\_\_\_\_  
 Sq in per grill \_\_\_\_\_

Existing Equipment profile continued...

## EXISTING EQUIPMENT PROFILE (cont)

### AIR CONDITIONING

Type of application:            Add-on                      Replace Existing  
Condenser Mfg: \_\_\_\_\_ Model # \_\_\_\_\_ Size: \_\_\_\_\_  
Evaporator Mfg: \_\_\_\_\_ Model # \_\_\_\_\_ Size: \_\_\_\_\_

### INSTALLATION

Condensate Drain Length: \_\_\_\_\_  
Emergency Drain System Required?                      Yes      No  
    If yes - Emergency Drain Length? \_\_\_\_\_  
    Safety Drain Pan Size? \_\_\_\_\_  
Same location as existing condensing unit?            Yes      No  
    If this is a new install or relocation of existing equipment,  
    where is new location? \_\_\_\_\_  
    Is there adequate clearance for new location? Yes      No  
Condensing unit pad:    New      Use Existing  
Evaporator coil:    New      Use Existing  
    If new, is there sufficient height for coil? Yes      No  
    If new, does supply air plenum need to be adapted? If yes,  
    describe \_\_\_\_\_  
\_\_\_\_\_  
Is expansion valve to be installed?                      Yes      No  
Line set size \_\_\_\_\_    New      Use Existing  
    Electrical Service Amps: \_\_\_\_\_  
    If a combination, describe installation \_\_\_\_\_  
\_\_\_\_\_  
Any inline driers required?                                      Yes      No

### ELECTRICAL

Condensing unit line voltage:                              New      Use Existing  
    If new, type of electrical?                              Breaker      Fuse  
    If new, how far to electrical panel? \_\_\_\_\_  
    If new, where is electrical panel located? \_\_\_\_\_  
    If new, what is the name of electrical panel (if applicable)? \_\_\_\_\_  
    If new, is sub-panel required?                      Yes      No  
    If new, is service adequate?                      Yes      No  
Condensing unit low voltage:                              New      Use existing

### SAFETY CONSIDERATIONS

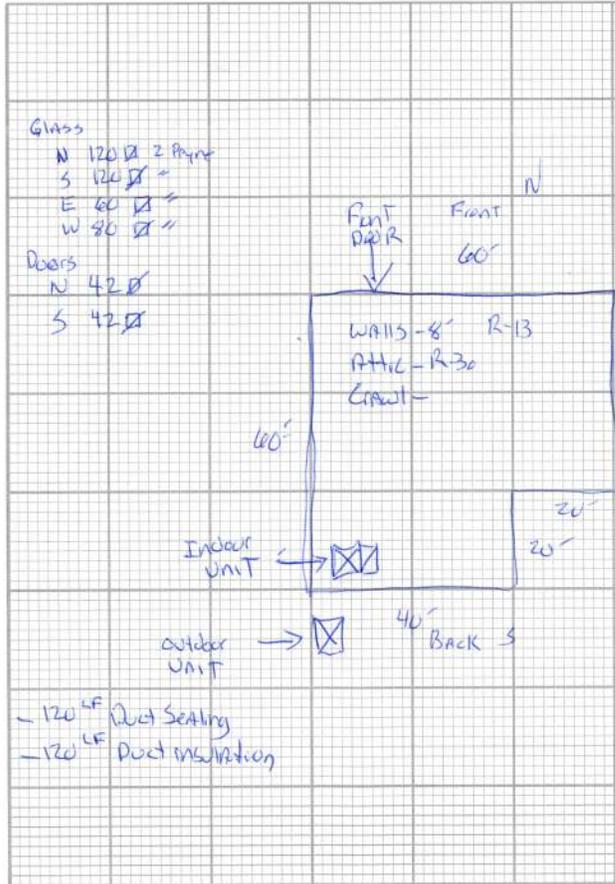
Are there any unusual internal or external property hazards that could impact employee safety? If yes, explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Are pets present?    Yes      No  
    If yes are there special precautions that should be taken? Yes      No  
    If so, please explain \_\_\_\_\_  
\_\_\_\_\_

### ASBESTOS CONSIDERATIONS

Is asbestos possibly present?                              Yes      No  
    If yes, describe possible location & length of runs? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
    If yes, describe ease of access \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
    If yes, will it be disturbed during the installation? Yes      No

**Special Instructions for Installation:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_

Draw out the dimensions of the home and document all necessary information to complete a heating and cooling load calculation: See example below:



**Document**

- North, South, East West
- Length and width of house
- Location and square feet of all doors and windows
- Type of doors and windows
- Single, Double or triple Payne windows
- Color and material of the roof

Photographs of front, right, back and left side of home.

**Take plenty of photographs.**

More photographs...

**Begin at the indoor unit.** front, right, left and back.

Supply plenum, Return drop or plenum, How the unit is suspended from the rafters or positioned on the basement floor. Is it in need of a lift box, filter rack. Curved return drop or properly sized return?

**Photograph the Venting, electrical and condensate line.**

**Take photos of the exposed ductwork in the attic, crawlspace or basement.**

Look for holes or leaks in the ductwork, loose fittings, broken heat runs or any area where the ductwork could be losing through leakage or losing air temperature due to poor duct insulation practices or conditions.

**Take photos of the access door, attic access or stairs leading into the indoor unit** so your installation Team can see what they are dealing with.

**Take photo's of the outdoor unit** and the path they should take in removing the old one and replacing it with the new one.

**Photograph the existing flue pipe** connection and where the new flue pipe will terminate.

You can never take too many photographs. Ask any installer or production manager and I'm confident that they will tell you the same thing. "You can never take too many photographs." (With-in reason of course).

**Now, connect the dots between all of the issues you've discovered with the existing installation and ductwork to the issues your customer wants you to correct on their list of goals.** Connect the problems you found to the comfort or health problems your customer said they wanted corrected and be prepared to show and tell them what you found and how you propose to make everything better.

**Use the series of photographs as "evidence"** of what you found and become an expert storyteller of how what you've discovered and photographed is causing their issues. That my friend is called "Selling".

**Think it through.** This is your opportunity to have a mental "Dress Rehearsal" of the presentation you are about to give your customer.

By now, you should have collected enough information to:

- Price your customers system options
- Price all additional work required to satisfy everything on their list of goals
- Calculate the proper system size
- Complete an operating cost comparison
- Show and tell your customer everything they need to see and hear to believe that you have the best solution to their problem.

The next step is to put your presentation together.



## Preparing your presentation

There are four critical areas in preparing for your presentation.

- Your Company's story
- Design considerations
- Identifying the dominant decision maker
- Helping the decision maker choose the best

### Preparing Your Company Story:

The primary objective of your company story is to minimize the risk for your customer in doing business with you compared to your competition. The questions your story should answer the customer's mind are:

- How much risk do I have been doing business with your company?
- What's different about this company compared to others?
- Can I trust this company to follow through with everything they propose?

Involve your customer conversationally by:

- Ask key questions to encourage involvement such as "how do you suppose we could offer something like that?" or "Can you believe we have to interview between 10 and 15 people just to find one that meets our minimum requirements?" and "do we sound like the type of company you would be comfortable working with?"
- Take your time conversationally
- Give your customer time to respond instead of thinking about what you're going to say next and waiting for the next opportunity to blurt out the next bit of information:

This will *influence* your customers' opinion of you and your company in your favor.

## **Outlining of an effective company story:**

### **Transitional statement followed by a leading question**

Example:

“My customers told me a long time ago they simply could not afford... not to have their work installed correctly the first time. And that’s why they appreciate the fact that we offer a 100% satisfaction guarantee that simply states, if for any reason you are unsatisfied with your installation, our employees, workmanship or the transaction within the first year of ownership we will do whatever it takes to make things right up to and including a 100% refund on your entire investment.”

“We assume all of the risk so you don’t have to.”

“How do you suppose we could offer something like that?”

### **Credibility of your employees**

Example:

“It’s because of the quality of our people. We employ the best, most talented heating and air-conditioning design teams, replacement and installation specialists, service and maintenance specialists and comfort advisors in the state. “

“Can you believe we have to interview between 10 and 15 people just to find one that meets our minimum requirements?”

### **Employment criteria:**

Example:

“Before we offer any person a position with our company, we perform a criminal history back round check to make certain they have a clear criminal record, we perform a driving history record to make sure that they have a responsible track record of safe driving and are insurable, we perform a drug screening on them as we periodically do with all employees to influence a drug-free environment and we also administer a competency test specific to the position each person applies for. Sadly, 80% of people applying for a position within our company failed to pass those minimum requirements.”

I’ve often wondered where those 80% of people found employment.”

### **Training agenda**

Example:

“All of employees are required to participate in a minimum of 120 hours of continuing education and skill development specific to their role within the company to make certain that the entire team is proficient with all new technologies, systems and processes necessary to improve our ability to deliver an exceptional customer experience.”

### **Licenses, insurance and certificates**

Example:

“ Are you aware that the city needs to be notified of your installation to make certain that the company doing the work is properly insured and licensed?”

“We take care of all of that for you. In fact, here is a copy of our license and liability insurance. I’ve heard so many stories of uninsured and licensed company’s installing systems improperly or damaging the home while dragging the heavy equipment in and out of homes. Most of those people were unaware that when they hire an uninsured or licensed contractor to do work on their property, all liability falls on the homeowner, not the company responsible for the damage or injury.”

My customers often times tell me how much they appreciate the fact that our team will roll out floor runners, wrap all of the old equipment in plastic and bag all of the additional debris before anything is carried through home. “

### **Awards:**

Example:

“These practices have earned our Company several awards with the:  
BBB

Good Housekeeping Seal of approval  
Lennox Excellence awards”

### **Memberships and affiliates**

Example:

“Our associations with:

Lions club

Chamber of Commerce

SERTOMA

Little League

Several faith based community service events throughout the year

Has given us the opportunity to support efforts to make our community better.”

### **Why you do what you do**

Example:

As for me, I enjoy discovering what and helping them solve problems.

I’ve been in the business for \_\_\_ years, love it and couldn't imagine doing anything else. Do you have any questions about me, my company or the way we do business?”

### **Follow up question:**

Example

“Do we sound like the type of company you would feel comfortable working with?”

### **Transition to the Design Consideration step:**

Example:

“Let take a look at what I found with the condition of your installation.”



### **Preparing your design consideration presentation:**

- Photographs of their system and design problems
- Explain how solving those problems will accomplish their goals

Customers normally purchase that which is brought to their attention. Bringing problematic situations that you can resolve to their attention will generally create a strong sense of urgency to take corrective action, especially if the situations brought to their attention correlates to everything on their list of goals.

**Arguably, THIS STEP IS where the sale is made.** This is where your customer will emotionally complete their journey from “I’m sort of interested in what this person has to say to this person has the best solution and I’m very confident that if I write them a check I will be in a better place.”

By now, you should have taken several photographs in the following order:

- Indoor unit
- Supply and return plenums and drops
- Filter rack, Filter inside the return, inside the air handler blower compartment
- All existing accessories
- Venting, electrical, condensate drain
- Accessibility to indoor unit
- Outdoor unit
- Refrigerant lines
- Thermostat

These photographs will serve as a visual illustration of every situation you’ve discovered that correlates to their list of goals. Make the connection between the two for your customer.

**Example 1:**

The rusty cabinet (Air handler or furnace): (Take a photograph of the rusty cabinet)

Symptoms:

Odors, allergy triggers, excessive dust.

Situation: Rust on the bottom of the cabinet of a furnace resting on a concrete floor.

Ask your customer "What does this look like on the bottom of your furnace?" while pointing to the rust in the photograph. They will say "Rust?" you say "that's right. What's happening is:"

Cause: "Moisture from the concrete wicks up through the insulation on the inside of the blower compartment and causes the metal cabinet to rust out."

Problem: Mold and mildew grows in dark damp places just like the inside of the blower compartment (take photograph illustrate) what does that look like?"..."Right." "When the blower turns on, where does that go? (Let the customer answer the question then reply) that's right. It gets distributed throughout your home. Could this be contributing to your the allergy symptoms, dust and odors?"

Solution: "When we install your system, we will set the indoor unit on a plastic pad that will serve as a moisture barrier to prevent this from happening. Can you see how that will reduce allergy triggers, dust and odors in your home?"

**Example 2:**

The 90-degree return drop:

Symptoms:

Noise, increased operating costs, excessive dust, longer run times, reduced heating and cooling capacity, uneven temperatures in the home.

Action:

Take a photo of the transition, the air filter and spotlight the patterns of the dirt captured on the filter. Often times, due to the air turbulence, half of the filter will load up first because air takes the path of least resistance. Once it loads up, the velocity of the air will cause most of the dirt to blow through the filter.

Cause: The air takes an indirect route to the blower intake making the system work harder to move and creates an uneven distribution of air in the home.

Problem: Reduction of filtering capability, uneven air distribution, increased noise and higher cost of operation.

Solution: Install a new return airdrop with a sweeping 90-degree radius elbow into a sealed external filter rack making it easier for the blower to evenly pull the air through the filter and distribute it throughout the home. Can you see how this will improve the filtering capability, reduce operating cost and help even out hot and cold spots in your home?

### **Example 3:**

#### Restricted return air drop (Return duct drop too small):

##### Symptoms:

Noise, increased operating costs, excessive dust, longer run times, reduced heating and cooling capacity, uneven temperatures in the home.

##### Action:

Take a photo of the drop, the air filter and spotlight the patterns of the dirt captured on the filter. Often times, due to the air velocity, the air filter will load quickly causing contaminants captured on the filter to “blow through” or “Bypass” the filter, contaminate the HVAC system and blow into the home through the supply registers.

##### Cause:

The heating and air-conditioning blower pulls air from the house through return air grills, into the return air ductwork, then it enters the return air drop which connects the ductwork to the blower compartment. If any part of that return system, the grills, the ductwork or the return air drop is too small, your heating and air-conditioning system will have to work harder to circulate enough air to keep your home comfortable. Improperly sized duct work causes increased operating costs, excessive dust, longer run times, reduce heating and cooling capacity and uneven temperatures in the home.

Let me give you an example:

“Imagine trying to breathe through a coffee stirrer straw.

You have to agree that would be a very difficult task right? That is how hard your blower has to work when the ductwork is too small. Can you see how that is creating some of the problems you are experiencing?”

Now imagine breathing through a big gulp straw. That would be much easier and much more comfortable wouldn't it?” You would have to agree that properly sizing the return drop will help your new system perform much better than if the duct design were left the way it is, right?”

##### Solution:

“When we install the proper sized return air ductwork to your new furnace, your system will be quieter, filter the air better, maintain better temperature throughout your home and cost less to operate. Does that make sense?”

#### **Example 4:**

##### Leaking ducts in unconditioned attic space:

##### Symptoms:

Increased operating costs, excessive runtime, excessive dust, and increased allergy triggers and poor humidity control.

##### Action:

Take photographs of leaking ductwork. An easy way to illustrate leaks is to insert an object into the leaking hole such as a pen or pencil, screwdriver or any type of item that will illustrate a leak. Take photographs of air leaks and the duct system in general.

##### Cause:

The blower pulls air from the house through return air grills, into the return air ductwork located in your attic, then it enters the return air drop, travels through your air filter to the blower compartment. The blower pushes the air through your furnace, your air conditioner coil, through your supply ductwork where the air is distributed throughout the home.

I found several leaks in the ductwork as you can see by these photographs. There are 15 to 20 holes just like these. Each hole represents about 1% of the air that is being pulled from your attic. So, if we add up all of the 15 holes I found, what percentage of the air is being distributed into your home from your attic?

What temperature is your attic in the summer?...and in the winter? Right.

Can you see how much harder your system has to work to keep your home comfortable if 15% of the air it is heating or cooling is coming from the attic? Not to mention the additional cost of operation.

What else is in your attic?

What kind of insulation is this? Right.

The ductwork is also pulling insulation, dirt, dust and allergens from the attic area, into your filter. Now, (hold up the air filter) we can literally see through this filter. In fact, if we poured salt on this filter, the salt would fall right through, right?

Can you imagine how much of the dust, insulation particles and allergen particles have been blowing through your filter and distributed through your home?

To make matters worse, 15 to 20% of the conditioned air that should be going into your home is being lost into your attic because of the leaks on the supply ductwork. That reduces the capacity of your furnace and air conditioner by 15 to 20% which makes it difficult to maintain even temperatures and may cause the home to be uncomfortable in extreme temperatures.

Can you see how sealing and insulating the ductwork and installing a hospital grade air filter along with an airtight filter cabinet will:

Reduce allergy triggers, Minimize dust, Help even out hot and cold spots and reduce operating cost? Does that make sense?

**Example 5:**Horizontal air handler suspended in attic with inadequate supports:

## Safety issues:

When horizontal units are suspended from rafters in attics, they should be supported in a fashion that prevents the unit from buckling in the middle. Often times, horizontal units are supported on each end, putting pressure and weight in the middle of the unit causing it to buckle. One indication of this is that the doors will not align with the original screw holes creating air leaks, condensation leaks and eventually, property damage.

Additionally, there should be a secondary “safety” condensate drain installed underneath the horizontal air handler to minimize the possibility of water damage to ceilings. Condensate drains are more likely to “stop up” when air handlers are located in attic areas due to the conditions of the attic area.

## Symptoms:

Water leaks, Increased operating costs, excessive runtime, excessive dust, and increased allergy triggers and poor humidity control.

## Solutions:

A secondary drain pan, safety switch that turns the air conditioner off when it senses moisture in the secondary drain and properly supporting the unit in a fashion that prevents it from “buckling” in the middle will solve this problem.

Duct sealing and insulating is also highly recommended.

**Example 6:**

Dirt streaks coming from supply diffusers or grills story:

Symptoms:

Excessive dust, and increased allergy triggers and poor humidity control.

Action:

Take photographs to illustrate the situation.

Cause:

Often times when supply registers or diffusers are installed, there are air gaps between the duct fitting and the register. Removing the register or grill will expose those gaps. As the air blows through the register or grill, it pulls air from the gaps creating dirt streaks on ceilings and registers. The air coming from the gaps often times carry allergens, dust and contaminants since that air usually comes from the area surrounding the ductwork, usually the attic, crawlspace or basement.

Solution:

Seal all air gaps between the duct fitting (supply boot) and the drywall to prevent air from being pulled into the conditioned space.

**Example 7:**Un-level outdoor unit:

## Issue:

Increased operating cost, excessive noise, reduces life expectancy and increases the work load on the air-conditioning system.

## Action:

Take photographs to illustrate the situation.

## Cause:

Oil, stored in the bottom of the air-conditioning compressor is used to lubricate the mechanical components of the unit. Oil is either distributed to those components from a small suction tube or by immersing a device that mechanically distributes the oil. When an outdoor unit becomes out of level, the air-conditioning system is unable to distribute the proper amount of oil to lubricate the mechanical parts causing premature wear and tear, increased operating cost, excessive noise and ultimately, failure.

## Solution:

Install the outdoor unit level and in a fashion that prevents it from becoming out of level due to thawing, freezing or erosion of the soil.

**Example 8:**Excessive refrigerant lines solder connections:

## Issue:

When copper is welded, the copper oxidizes. Oxidation is to an air-conditioning system as cholesterol is to a human heart. Too much of it at once or small amounts over a period of time will cause damage or failure.

## Solution:

Install the lines with as few solder connections as possible by using copper tubing benders.

Purge lines with a small amount of nitrogen while making the solder connections to eliminate oxidation inside the copper lines.

Pull a vacuum on new lines before opening the refrigerant valves.

### **Example 9:**

#### Leaky ducts located in garage:

Symptoms: Increased operating costs, excessive runtime, excessive dust, and increased allergy triggers and poor humidity control, possible CO levels in home.

Action: Take photographs of leaking ductwork.

Cause: The blower pulls air from the house through return air grills, into the return air ductwork located in your attic, then it enters the return air drop in your garage, travels through your air filter to the blower compartment. The blower pushes the air through your furnace, your air conditioner coil, through your supply ductwork where the air is distributed throughout the home.

I found several leaks in the ductwork as you can see by these photographs. There are 15 to 20 holes just like these. Each hole represents about 1% of the air that is being pulled from your garage area. So, if we add up all of the 15 holes I found, what percentage of the air is being distributed into your home from your attic and garage? What temperature is your attic and garage in the summer?...and in the winter? Right.

Can you see how much harder your system has to work to keep your home comfortable if 15% of the air it is heating or cooling is coming from the attic? Not to mention the additional cost of operation.

What else is in your attic and garage? Right.

The ductwork is also pulling insulation, dirt, dust and allergens from the attic and garage area, into your filter. Now, (hold up the air filter) we can literally see through this filter. In fact, if we poured salt on this filter, the salt would fall right through, right?

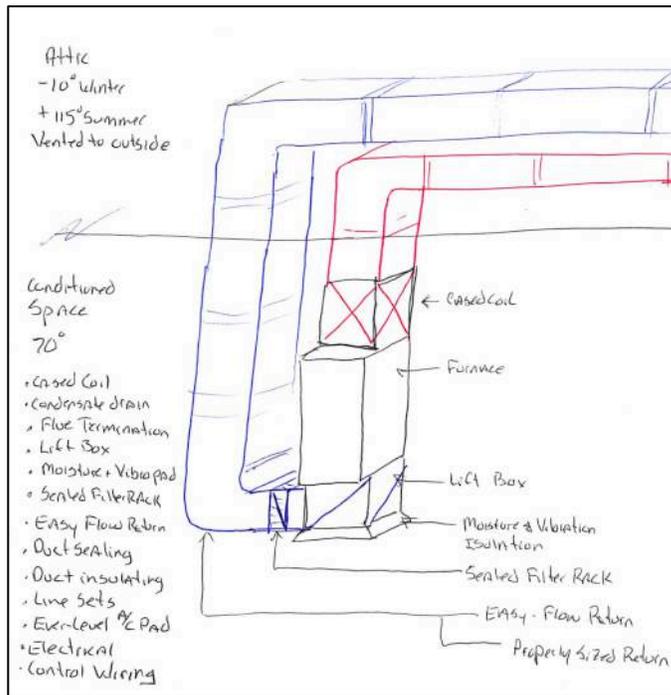
Can you imagine how much of the dust, insulation particles and allergen particles have been blowing through your filter and distributed through your home?

When you start your car in the morning or turn in off after you pull it into the garage, often times the exhaust fumes get drawn into the ducts when the blower is running along with the other chemicals and cleaning supplies increasing allergy triggers and odors. To make matters worse, 15 to 20% of the conditioned air that should be going into your home is being lost into your attic because of the leaks on the supply ductwork. That reduces the capacity of your furnace and air conditioner by 15 to 20% which makes it difficult to maintain even temperatures and may cause the home to uncomfortable in extreme temperatures.

Can you see how sealing and insulating the ductwork and installing a hospital grade air filter along with an airtight filter cabinet will: Reduce allergy triggers, Minimize dust, Help even out hot and cold spots and reduce operating cost? Does that make sense?

**Sketching out an illustration** of their system or referring to an illustration as you are describing what you've found while showing them the photo evidence greatly enhances the customer experience. It can also serve as additional information for your Installation team.

Below is an example of a conversational sketch.



Make a list of “talking points to keep your conversation on track as illustrated on the bottom left side of the “sketch example”.

Tell the “system story” and involve your customer in the conversation as illustrated in the previous 9 examples.

Constantly refer to the photographs of their system as you move along with your story for credibility and relevance.

Slow your pace and tempo down. Take it slow. Give your customer time to understand each situation.

### Preparing your system options

**You must become an expert** in selecting equipment combinations designed to satisfy everything on your customers’ list of goals and connect the dots between system features and how those features get the job done.

When your customer draws the conclusion that what your proposing will satisfy everything on their list of goals and believes that there is very little risk in doing business with you and your company, they are more likely to invest more money to get what they want.

This is why it is so important to establish a written list of goals in early on in the sales call so they are clear on what you will be putting together for them and you are clear on exactly what they want.

Fundamentally, you need to know how to explain and demonstrate how each feature of different systems you design for them will solve their specific and unique problems as listed on their list of goals.

Which rooms are difficult to heat or cool?		→	<u>Make areas more comfortable:</u> <ul style="list-style-type: none"><li>• Making it easier for them to heat and cool their home</li><li>• Maintain more even temperatures</li><li>• Even out hot and cold spots</li></ul>
What areas have uneven temperatures?			
Where are the hot or cold spots in your home?			
How humid is your home in the summer?		→	<u>Control humidity levels in the home:</u> <ul style="list-style-type: none"><li>• Reducing allergy triggers</li><li>• Reducing odors in the home</li><li>• Making the home more comfortable</li></ul>
How dry is your home in the winter?			
How often do you have to dust?		→	<u>Minimize dust circulation</u> <u>Reduce Allergy Triggers</u>
Who in your home has Allergy, I			
What was your highest heating bill?		→	<u>Reduce operating costs:</u> <ul style="list-style-type: none"><li>• Saving them money</li><li>• Helping them offset their investment</li></ul>
What was your highest cooling bill?			
What would an average bill be?			
excessive noise from your system?		→	<u>Reduce system noise:</u> <ul style="list-style-type: none"><li>• Helping them sleep better</li><li>• Making it Easier to hear the television</li><li>• Make enjoying their deck better</li></ul>

Make yourself relevant to your customer by offering solutions that are important to them and in alignment with what they told you they wanted when you established their list of goals. Focus on the things that are important to THEM, not you.

**Never stop learning** and stay ahead of the HVAC technology curve.

Understanding the dynamics of Pressure, Temperature and Moisture and some basic principles of Conduction, Convection and Radiation will help you identify problems and offer believable solutions.

### Example #1:

Allergy triggers and Humidity... (Relationship between temperature and moisture)  
Mold is an allergen. Mold (Fungi) produces allergens when it grows. When mold stops growing, it stops producing allergens. Mold (Fungi) stops growing when the relative humidity is below 50%. Above 50% it produces allergens. Below 50% it does not.

(Problem is significantly improved!)

### Example #2:

Dust mite fecal matter is an allergen.

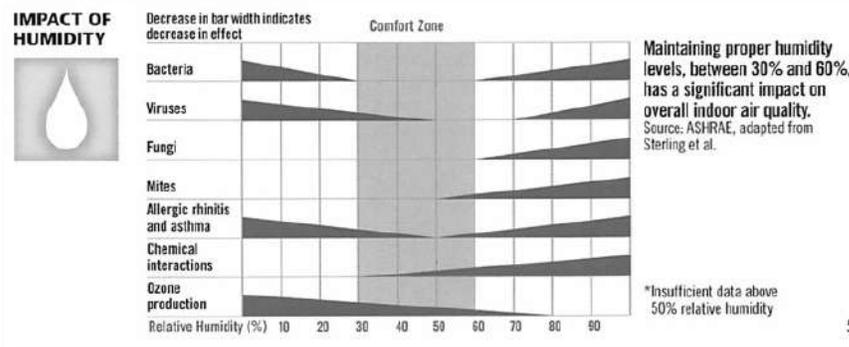
Dust mites are microscopic bugs that feed on pet dander, hair and skin. Fecal matter secretion from dust mites trigger allergies. Dust mites hydrate themselves by absorbing moisture from the humidity in the air. If the relative humidity falls below 50%, dust mites cant hydrate and they die.

Can you see how by controlling the humidity level below 50% in a home will reduce allergy triggers caused by dust mites? (Problem is significantly improved!)

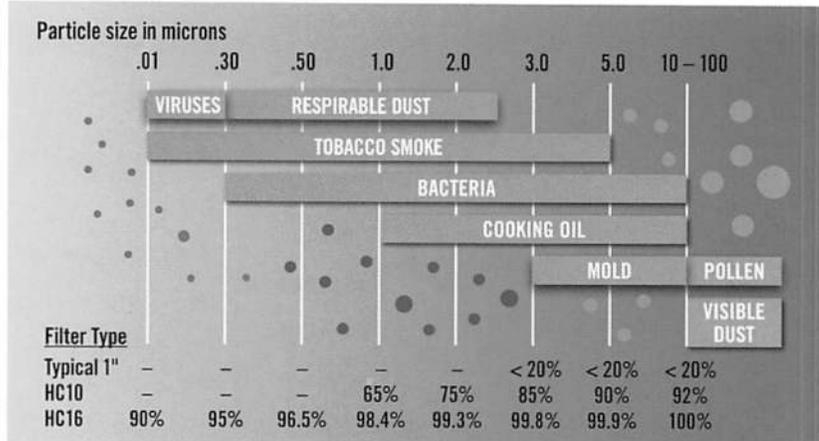
### Example #3:

Bacteria, Viruses and Asthma symptoms flourish when the relative humidity is below 35% in the winter (Dry) and above 60% in the summer (humid). When we control and regulate the relative humidity in the home between 50% in the summer months and above 35% in the winter, Allergy triggers, asthma triggers and odors are reduced. Can you see how designing a system that can control and regulate the humidity in your home will make your home healthier and more comfortable?

**3<sup>rd</sup> party references are important.** Study the charts below and think through different scenarios your customer might be seeing, hearing, tasting, smelling or feeling in the home, then connect the dots between the experience your customer wants to make better and how you propose to make it better.



## PARTICLE-REMOVAL EFFICIENCY – HEALTHY CLIMATE® AIR CLEANERS



## MERV RATINGS EXPLAINED

MERV	Composite average particle size efficiency, % in size range, µm			Examples	Typical Applications
	Range 1 0.30-1.0	Range 2 1.0-3.0	Range 3 3.0-10.0		
1	n/a	n/a	E3 < 20	Standard 1" Disposable Filters	Residential Homes, Commercial Buildings, Industrial Factories—helps protect HVAC equipment from damage
2	n/a	n/a	E3 < 20		
3	n/a	n/a	E3 < 20		
4	n/a	n/a	E3 < 20		
5	n/a	n/a	20 ≤ E3 < 35		
6	n/a	n/a	35 ≤ E3 < 50		
7	n/a	n/a	50 ≤ E3 < 70		
8	n/a	n/a	70 ≤ E3	1" Pleated Media Filters	Residential Homes, Commercial Buildings—helps maintain HVAC equipment efficiency
9	n/a	E2 < 50	85 ≤ E3		
10	n/a	50 ≤ E2 < 65	85 ≤ E3		
11	n/a	65 ≤ E2 < 80	85 ≤ E3		
12	n/a	80 ≤ E2	90 ≤ E3		
13	E1 < 75	90 ≤ E2	90 ≤ E3	2"–5" Precision Pleated Media Filters	Residential Homes, Commercial Buildings, Health Care Facilities—helps improve indoor air quality by significantly reducing airborne allergens
14	75 ≤ E1 < 85	90 ≤ E2	90 ≤ E3		
15	85 ≤ E1 < 95	90 ≤ E2	90 ≤ E3		
16	95 ≤ E1	95 ≤ E2	95 ≤ E3		

Source: ASHRAE 52.5



PURIFICATION	
<b>Problem</b>	<b>Odors and Chemical Vapors</b> Perfumes, cleaning supplies, paints, pet odors, cooking fumes and other airborne contaminants <b>Small, Respirable Particles and Bioaerosols/Microorganisms</b> Pollen, dirt, pet dander, dust mites, bacteria, viruses and mold
<b>Solution</b>	<b>Air-purification systems attached to the furnace or air handler, where contaminants are removed and destroyed before air is recirculated into the home</b>



ELIMINATION	
<b>Problem</b>	<b>Small, Respirable Bioaerosols/Microorganisms</b> Pet dander, dust mites, bacteria, viruses, mold and other contaminants that can collect on the air conditioning coil, reducing system efficiency, and circulate through the home.
<b>Solution</b>	<b>UV lights dramatically reduce concentrations of potentially harmful microorganisms</b>



VENTILATION	
<b>Problem</b>	<b>Poor Airflow</b> A common problem in newer homes, which are tightly sealed to conserve energy. Instead of continually moving, indoor air becomes stagnant, and contaminants have no way to escape.
<b>Solution</b>	<b>Ventilation systems replace stale, contaminated indoor air with outdoor air—providing the fresh-air feel of an open window, with virtually no heat/energy loss or safety risk</b>



HUMIDITY CONTROL	
<b>Problem</b>	<b>Too Much Moisture</b> Can make the air feel stuffy and warmer than the actual temperature, and can also promote the growth of mold, mildew, fungi, bacteria and viruses <b>Too Little Moisture</b> Can cause dry skin, sore throats and respiratory problems, along with annoying static electricity
<b>Solution</b>	<b>Dehumidifiers and humidifiers work with the home's heating and cooling system to keep moisture levels balanced in every room</b>

CAT#	DESCRIPTION
<b>PUREAIR™ SYSTEM</b>	
X8785	PCO20-28 PureAir System*
Y2922	PCO16-28 PureAir System
X8787	PCO14-23 PureAir System
<b>PUREAIR MAINTENANCE KITS</b>	
X8795	PCO20-28
X8796	PCO16-28
X8797	PCO14-23

CAT#	DESCRIPTION
<b>HEALTHY CLIMATE™ UV LIGHTS</b>	
X4573	UV-1000 Germicidal light
X4575	UV-2000 Germicidal Dual light
X9423	UVC-24V
X9424	UVC-41W-S
X9425	UVC-41W-D

CAT#	DESCRIPTION
<b>HEALTHY CLIMATE HEAT AND ENERGY RECOVERY VENTILATORS (HR/VERV)</b>	
Y2144	HRV3-300 (300 CFM)
Y2143	HRV3-195 (195 CFM)
Y2142	HRV3-095 (095 CFM)
Y2141	HRV3-200 (200 CFM)
Y2140	HRV3-150 (150 CFM)
Y2139	ERV3-200 (200 CFM)
Y2138	ERV3-150 (150 CFM)
<b>LENNOX® VENTILATION CONTROL SYSTEM (LVCS)</b>	
X4141	LVCS Lennox Ventilation Control System

CAT#	DESCRIPTION
<b>HUMIDITROL®</b>	
94M41	EDA-024B
94M42	EDA-036C
94M43	EDA-060D

HEALTHY CLIMATE DEHUMIDIFIER	
Y3013	HCWH-065
Y1841	HCWH-090
Y1842	HCWH-135

HEALTHY CLIMATE HUMIDIFIERS	
Y3478	HCSteam-16
Y3479	HCSteam-35
Y2789	HCWP3-18A Power 18 gal. w/Automatic Control
Y2788	HCWP3-18 Power 18 gal. w/Humidistat
Y2787	HCWB3-17A Bypass 17 gal. w/Automatic Control
Y2785	HCWB3-12A Bypass 12 gal. w/Automatic Control
Y2786	HCWB3-17 Bypass 17 gal. w/Humidistat
Y2784	HCWB3-12 Bypass 12 gal. w/Humidistat

You will never go wrong when you back up what you say and recommend with facts. A good habit for any sales person is to make a statement followed up the facts.

Example:

“Based on what I’m hearing from you, I’m going to recommend a pure air system because...”

**UNMATCHED CLEANING POWER OF THE PUREAIR™ SYSTEM, COMPARED TO OTHER TECHNOLOGIES**

	PureAir™ System	Active Carbon Filter	HEPA Filter	High-Energy UVC Light	Standard Box Filter	Electronic Air Cleaners
Captures small, breathable particles down to 0.3 micron	•		•			•
Captures airborne mold and other bioaerosols down to 0.01 micron	•		•			
Destroys odors (cooking fumes, pet odors)	•	• <sup>1</sup>				
Removes chemical vapors (fumes from household products)	•	• <sup>1</sup>				
Reduces ozone	•	•				
Does not generate ozone	•	•	•	• <sup>2</sup>	•	
Whole-home hospital-grade filtration	•					
Low operating cost	•	•		•	•	

<sup>1</sup>Only captures, does not destroy  
<sup>2</sup>With use of non-ozone lamps.

Dave Lennox Signature® Collection PureAir™ Air Purification Systems			
	PC014-23	PC016-28	PC020-28
Precision Pleat™ Filter	MERV 16	MERV 16	MERV 16
Filter Life	Up to One Full Year*	Up to One Full Year*	Up to One Full Year*
Lamp Life	2 Lamps/1 Year	2 Lamps/1 Year	2 Lamps/1 Year
Insert Life	1 Year	1 Year	1 Year
Electrical Rating	120/230V; 50/60 Hz; 150 watts; 1.2/65 amps	120/230V; 50/60 Hz; 150 watts; 1.2/65 amps	120/230V; 50/60 Hz; 150 watts; 1.2/65 amps
Dimensions HxWxD (in.)	21-1/8 x 10 x 23	17-1/4 x 10 x 28-1/2	21-1/8 x 10 x 28-1/2
HxWxD (mm)	540 x 254 x 584	438 x 254 x 724	540 x 254 x 724

\*Based on average hours of fan operation from six cities when thermostats are placed on “auto” versus “continuous” fan. More frequent filter changes may be required in situations with high dust or dirt loads.

**MERV RATINGS EXPLAINED**

MERV	Composite average particle size efficiency, % in size range, µm			Examples	Typical Applications
	Range 1 0.30-1.0	Range 2 1.0-3.0	Range 3 3.0-10.0		
1	n/a	n/a	E3 < 20	Standard 1" Disposable Filters	Residential Homes, Commercial Buildings, Industrial Factories—helps protect HVAC equipment from damage
2	n/a	n/a	E3 < 20		
3	n/a	n/a	E3 < 20		
4	n/a	n/a	E3 < 20		
5	n/a	n/a	20 ≤ E3 < 35		
6	n/a	n/a	35 ≤ E3 < 50		
7	n/a	n/a	50 ≤ E3 < 70		
8	n/a	n/a	70 ≤ E3	1" Pleated Media Filters	Residential Homes, Commercial Buildings—helps maintain HVAC equipment efficiency
9	n/a	E2 < 50	85 ≤ E3		
10	n/a	50 ≤ E2 < 65	85 ≤ E3		
11	n/a	65 ≤ E2 < 80	85 ≤ E3		
12	n/a	80 ≤ E2	90 ≤ E3		
13	E1 < 75	90 ≤ E2	90 ≤ E3	2"-5" Precision Pleated Media Filters	Residential Homes, Commercial Buildings, Health Care Facilities—helps improve indoor air quality by significantly reducing airborne allergens
14	75 ≤ E1 < 85	90 ≤ E2	90 ≤ E3		
15	85 ≤ E1 < 95	90 ≤ E2	90 ≤ E3		
16	95 ≤ E1	95 ≤ E2	95 ≤ E3		

Source: ASHRAE 52.5

...As you can see, it is a health care facility grade system that significantly reduces airborne allergens. This system hands down, performs better than any other filtration and purification system for residential applications. Can you see how this system will reduce airborne allergy and hay fever triggers? Let the facts, statistics and evidence tell the story for you whenever possible. Be prepared.

## **Equipment features**

**Become an expert in explaining equipment features** and how they solve problems relevant to each customer.

### **Examples:**

#### **Variable airflow compared to single stage airflow**

Variable airflow helps minimize temperature swings by gradually increasing the airflow on a call for heating or cooling instead of forcing air out of your vents at full speed before your system had a chance to condition it. You can also set the blower to circulate the air at a very low speed during the off cycles which will maintain a more even temperature as well as clean and purify the air 24/7 instead of limiting healthy air circulation, cleaning and purifying to a call for heating or cooling.

#### **Variable capacity air conditioning compared to 2-stage and 1- stage De-Humidification and cooling cycle compared to cooling only cycle**

A properly sized air conditioner will maintain a (insert your number here) 72-degree indoor temperature at a (insert your number here) 100-degree outdoor temperature. Your home requires 3 tons of cooling.

Air conditioners fall under three classifications: single stage, two stage and variable stage.

What percentage of the days your air conditioner operated last year was close 100 degrees outside?

Right... On average, 20% to 30% of the time. In fact, the median summer temperature in our area is 80 degrees. On a humid 80 degree summer day, your three-ton air conditioner cycles on, cools the house quickly because it is designed to handle a 100 degree day, resulting in poor humidity control and higher operating cost. Have you ever experienced an 80-degree day where the temperature is satisfied but it still feels humid and uncomfortable? That's why.

**A variable speed air conditioner** has 66 stages of cooling, paired with a variable airflow blower. This system will match the proper capacity (speed) of the air conditioner and airflow to the outdoor conditions. Once the temperature in the home is satisfied, then, it will check the relative humidity and shift to a dehumidification cycle to maintain a more comfortable and healthy humidity level in the home, delivering clean, crisp and fresh air. And by the way, this is the quietest, most efficient system in its class available today.

**A two stage air conditioner** operates similar to a variable speed with-out 64 stages of air-conditioning and a limited de-humidification cycle.

### **Modulating heat compared to 2-stage and 1-stage**

A properly sized furnace will maintain a (insert your number here) 68-degree indoor temperature at a (insert your number here) -10-degree outdoor temperature. Your home requires 90,000 BTU's of heating.

Gas furnaces fall under three classifications: single stage, two stage and variable stage.

What percentage of the days your furnace operated last year was close -10 degrees outside?

Right... On average, 20% to 30% of the time. In fact, the median winter temperature in our area is 25 degrees. On a cool 25 degree winter day, your 90,000 BTU furnace cycles on, heats the house up quickly because it is designed to handle a -10 degree day, resulting in dry, drafty air and higher operating cost.

**A variable speed furnace** has 66 stages of heating, paired with a variable airflow blower. This system will match the proper capacity (speed) of the furnace and airflow to the outdoor conditions. Once the temperature in the home is satisfied, then, it can (optional) shift to a air circulation cycle to maintain a more comfortable and healthy humidity level in the home, when paired with a whole house humidifier and health care grade air filter, delivering clean, crisp and fresh air. And by the way, this is the quietest, most efficient system in its class available today.

A two-stage furnace operates similar to a variable speed without 64 stages of heating.

Be prepared to demonstrate:

- Noise decibel rating comparison
- Operating cost comparison

### **Your customer is in control of buying.**

You are in control of the process. Having said that, you must develop the ability to detach yourself from the price. They determine the price, not you. It has to make sense for them, not you. Give them the opportunity to discover what the Best system can do for them compared to a Better, Good and Basic and let them decide. The worst thing we can do to a customer is not give them the opportunity to see the BEST solutions available to them. Their job is to decide if it makes sense to buy it, not yours. Your job is to follow the process.

## Preparing your system options worksheet.

<b>Customer Goals</b>				
<hr/>				
<b>Code &amp; Safety Issues</b>		<b>Required System Size</b>		
<hr/>		Heating BTU	Cooling Tons / BTU	
<hr/>		<hr/>	<hr/>	
<hr/>				
<hr/>				
<b>System Options</b>				
	<b>Best</b>	<b>Better</b>	<b>Good</b>	<b>Base</b>
<i>Features</i>	<hr/>	<hr/>	<hr/>	<hr/>
	<hr/>	<hr/>	<hr/>	<hr/>
	<hr/>	<hr/>	<hr/>	<hr/>
	<hr/>	<hr/>	<hr/>	<hr/>
	<hr/>	<hr/>	<hr/>	<hr/>
<i>Total Investment</i>	<hr/>	<hr/>	<hr/>	<hr/>
<i>Minus Credits</i>	<hr/>	<hr/>	<hr/>	<hr/>
<i>Net Investment</i>	<hr/>	<hr/>	<hr/>	<hr/>
<i>Monthly Payment</i>	<hr/>	<hr/>	<hr/>	<hr/>
<i>Minus Savings</i>	<hr/>	<hr/>	<hr/>	<hr/>
<i>Net Monthly Investment</i>	<hr/>	<hr/>	<hr/>	<hr/>
<b>Additional Work / Enhancements</b>				
<hr/>				

Your system options worksheet should consist of everything that makes up the price:

- Customer goals
- Code and Safety issues
- Size of equipment
- Additional work

**Customer Goals**

1. Reduce allergy triggers
2. Make upstairs bedroom comfortable
3. Reduce noise & operating expense

Carol & Tom Withman  
 11995 Hoster Rd.  
 Carmel IN. 46033

**Code & Safety Issues**

New Furnace Circuit  
 New A/C Safety Switch  
 Water Heater Flux Liner

**Required System Size**

Heating BTU      Cooling Tons / BTU  
 90,000              3 Ton

\*Included in Price\*

**System Options**

	Best	Better	Good	Base
Features Variable Air	Yes	Yes	—	—
Variable A/C	66 Stage	2-Stage	—	—
Modulating Heat	66 Stage	2-Stage	2-Stage	—
De-humidification stage	Yes	Partial	—	—
10-Year Projected Saving	6,500	5,500	3,600	2,300
Total Investment	20,315 <sup>00</sup>	18,632 <sup>00</sup>	14,107 <sup>00</sup>	9,055 <sup>00</sup>
Minus Credits	-2,000 <sup>00</sup>	-1,000 <sup>00</sup>	—	—
Net Investment	18,315 <sup>00</sup>	17,632 <sup>00</sup>	14,107 <sup>00</sup>	9,055 <sup>00</sup>
Monthly Payment	550	425	400	250
Minus Savings	-28	-25	-15	-11
Net Monthly Investment	522	400	385	239

**Additional Work / Enhancements** \*Included in price

Whole house humidifier  
 Germicidal U.V. Light  
 Duct Sealing & Insulating  
 Health Care grade Air Filter  
 Easy Flow Air Return

External Filter Rack  
 Line-Set, Pad, Disconnect Whip  
 All Necessary duct Transitions  
 Documented Safety & Code Issues  
 Vapor & Noise Isolation Pad

"The price is made up of four things:

1. Code and safety issues.
2. The required size of equipment.
3. The type of system you want along with the installed prices.
4. The additional work required to accomplish everything on your list of goals.

No matter which system you choose, all of them will do a great job compared to what you have.

May I show you the system that will do the Best job for you?"

This worksheet is designed to qualify your customer. When they say YES I want more information on the system that will do the Best job, they gave you permission to review the Best option. They qualified themselves as someone interested in the Best.

This worksheet can be completed in the home at the Kitchen table within 5 to 10 minutes as long as you have a pre-priced retail reference, which is highly recommended. Being prepared to review prices with your customer on every sales call will win you more jobs. Be prepared.

There are several I-pad or Computer driven replacement sales programs available that encourage a high level of customer interaction and may convey a more professional image.

		Best	Better	Good	Base
<b>Heating</b>					
	SLP98UH070XV36B	SLP98UH070XV36B	EL296UH070XE36B	ML195UH070XP36B	
<b>Installation Includes:</b>	SLP98V	SLP98V	EL296E	ML195	
Electrical	DAVE LENNOX SIGNATURE® COLLECTION	DAVE LENNOX SIGNATURE® COLLECTION	ELITE® SERIES	MERIT® SERIES	
Programmable Thermostat	Gas Furnace	Gas Furnace	Gas Furnace	Gas Furnace	
Gas Connection	98% Efficient	98% Efficient	96% Efficient	95% Efficient	
Sheet Metal Transitions					
Furnace Base					
Permits					
<b>Cooling</b>					
	XC25-024-230	XC21-024-230	XC16-024-230	13ACX-024-230	
<b>Installation Includes:</b>	XC25	XC21	XC16	13ACX	
Electrical	DAVE LENNOX SIGNATURE® COLLECTION	DAVE LENNOX SIGNATURE® COLLECTION	ELITE® SERIES	MERIT® SERIES	
Paid	Air Conditioner	Air Conditioner	Air Conditioner	Air Conditioner	
Sheet Metal Transitions	25 SEER	20.7 SEER	16 SEER	13 SEER	
Line-set					
Permits					
<b>Coil</b>					
	CX34-24A-6F	CX34-24C-6F	CX34-25A-6F	CX34-25A-6F	
	<b>\$18,587</b>	<b>\$17,807</b>	<b>\$12,072</b>	<b>\$8,047</b>	
<b>Enhancements</b>					
Humidifier	HCSTEAM WHOLE-HOME STEAM HUMIDIFIER	HCWB3 BYPASS HUMIDIFIER	HCWB3 BYPASS HUMIDIFIER	HCWB3 BYPASS HUMIDIFIER	
	\$904	\$239	\$267	\$225	
Germicidal Lamp	UV GERMICIDAL LIGHTS (REMOTE)	UVC GERMICIDAL LIGHTS (SURFACE)	UVC GERMICIDAL LIGHTS (SURFACE)	UVC GERMICIDAL LIGHTS (SURFACE)	
	\$643	\$272	\$341	\$272	
	<b>\$1,447</b>	<b>\$510</b>	<b>\$608</b>	<b>\$497</b>	
<b>Install Additions</b>	<b>\$695</b>	<b>\$695</b>	<b>\$695</b>	<b>\$695</b>	
<b>Credits</b>	<b>(\$415)</b>	<b>(\$380)</b>	<b>(\$267)</b>	<b>(\$185)</b>	
	<b>Best</b>	<b>Better</b>	<b>Good</b>	<b>Base</b>	
<b>Total Investment</b>	<b>\$20,315</b>	<b>\$18,632</b>	<b>\$13,107</b>	<b>\$9,055</b>	
	\$642 per month	\$586 per month	\$402 per month	\$268 per month	
	Select	Select	Select	Select	

"The price is made up of four things:  
1. Code and safety issues.

2. The required size of equipment.

3. The type of system you want along with the installed prices.

4. The additional work required to accomplish everything on your list of goals.

No matter which system you choose, all of them will do a great job compared to what you have.

May I show you the system that will do the Best job for you?"

MF-141202-1624 **Home Comfort Specialists Heating & Air**

		Best	Better	Good	Base
<b>System Detail</b>					
<b>Heating</b>					
	SLP98UH070XV36B				
<b>Installation Includes:</b>	SLP98V				
Electrical	DAVE LENNOX SIGNATURE® COLLECTION				
Programmable Thermostat	UPFLOW / HORIZONTAL				
Gas Connection					
Sheet Metal Transitions					
Furnace Base					
Permits					
<b>Cooling</b>					
	XC25-024-230				
<b>Installation Includes:</b>	XC25				
Electrical	DAVE LENNOX SIGNATURE® COLLECTION				
Paid	UPFLOW CASED				
Sheet Metal Transitions					
Line-set					
Permits					
<b>Coil</b>					
	CX34-24A-6F				
	<b>\$18,587</b>				
<b>Enhancements</b>					
Humidifier	HCSTEAM WHOLE-HOME STEAM HUMIDIFIER	\$904			
Germicidal Lamp	UV GERMICIDAL LIGHTS (REMOTE MOUNT)	\$643			
	<b>\$1,447</b>				
<b>Install Additions</b>	<b>\$695</b>				
<b>Credits</b>	<b>(\$415)</b>				
	<b>\$20,315</b>				
<b>Total Investment</b>	\$642 per month				
	<b>Email Proposal</b>				

**How does this system address your comfort concerns or goals?**

- Reduce Allergy Triggers
- Keep upstairs bedroom warm in winter
- Reduce gas and electric bill
- Better humidity control
-

Whether you utilize a manual or electronic version of pricing, the strategy is exactly the same:

Let your customer qualify which system makes the most sense for them...

“ I’ve put together four system options for us to review. These prices are made up of:

1. Code and safety issues 2. The size of system necessary to keep your home comfortable. 3. The type of system you want and 4. The additional work required in accomplishing your goals.

No matter which of these four systems you choose, any of them will do a much better job than the one you have... May I review the one that will do the best job for you?”

Put your system options together in a fashion that encourages your customer to qualify which system makes sense for them (regardless of the price, let them choose).

After you've prepared the following:

- A prepared “Company story” with all necessary documentation to back it up.
- Design considerations presentation
- Pictures of issues creating problems relevant to their list of goals
- Drawn illustrations
- A completed mechanical home survey
- A Heating and cooling load calculation
- A prepared story that will connect everything on their list of goals to problems found with Ductwork, Temperature control, General condition of the installation, poor Air filtration...etc.
- System options presentation
- Have accessible all relevant brochures (electronic or non electronic)

You are ready to engage the customer and go to the next step:



### **Transition to the Company Story:**

“Great news, I’ve completed your evaluation and know what we need to do to take care of everything on your list of goals. Ok if we go to the table so I can review everything with you?”

### Transitional statement followed by a leading question (On the way to the table)

“My customers told me a long time ago they simply could not afford... not to have their work installed correctly the first time. And that’s why they appreciate the fact that we offer a 100% satisfaction guarantee that simply states, if for any reason you are unsatisfied with your installation, our employees, workmanship or the transaction within the first year of ownership we will do whatever it takes to make things right up to and including a 100% refund on your entire investment.”

“We assume all of the risk so you don’t have to.”

“How do you suppose we could offer something like that?”

### Credibility of your employees

“It’s because of the quality of our people. We employ the best, most talented heating and air-conditioning design teams, replacement and installation specialists, service and maintenance specialists and comfort advisors in the state. “ “Can you believe we have to interview between 10 and 15 people just to find one that meets our minimum requirements?”

### Employment criteria:

“Before we offer any person a position with our company, we perform a criminal history back round check to make certain they have a clear criminal record, we perform a driving history record to make sure that they have a responsible track record of safe driving and are insurable, we perform a drug screening on them as we periodically do with all employees to influence a drug-free environment and we also administer a competency test specific to the position each person applies for. Sadly, 80% of people applying for a position within our company failed to pass those minimum requirements.”

I’ve often wondered where those 80% of people found employment.”

### Training agenda

“All of employees are required to participate in a minimum of 120 hours of continuing education and skill development specific to their role within the company to make certain that the entire team is proficient with all new

technologies, systems and processes necessary to improve our ability to deliver an exceptional customer experience.”

#### Licenses, insurance and certificates

“ Are you aware that the city needs to be notified of your installation to make certain that the company doing the work is properly insured and licensed?”

“We take care of all of that for you. In fact, here is a copy of our license and liability insurance. I’ve heard so many stories of uninsured and licensed company’s installing systems improperly or damaging the home while dragging the heavy equipment in and out of homes. Most of those people were unaware that when they hire an uninsured or licensed contractor to do work on their property, all liability falls on the homeowner, not the company responsible for the damage or injury.”

“All of our Replacement specialists roll out floor runners, wrap all of the old equipment in plastic and bag all of the additional debris before anything is carried though home. “

#### Awards:

“These practices have earned our Company several awards with the:

BBB

Good Housekeeping Seal of approval

Lennox Excellence awards”

#### Memberships and affiliates

“Our associations with:

Lions club, Chamber of Commerce, SERTOMA, Little League and

Several faith based community service events throughout the year

Has given us the opportunity to support efforts to make our community better.”

#### Why you do what you do

“As for me, I enjoy discovering what and helping them solve problems.

I’ve been in the business for \_\_\_ years, love it and couldn't imagine doing anything else. Do you have any questions about me, my company or the way we do business?”

#### Follow up question:

“Do we sound like the type of company you would feel comfortable working with?”

#### Transition to the Design Consideration step:

“Let take a look at what I found with the condition of your installation.”

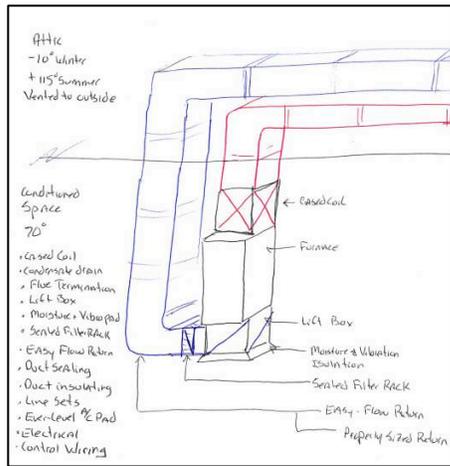


**Transition to the Design considerations stories:**

Review their list of goals:

“Lets begin with what I found at your indoor unit, ok?”

“What does this look like on the bottom of your furnace?” while pointing to the rust in the photograph. They will say “Rust?” you say “that's right. What's happening is:”



“Moisture from the concrete wicks up through the insulation on the inside of the blower compartment and causes the metal cabinet to rust out.”

“Mold and mildew grows in dark damp places just like the inside of the blower compartment (take photograph illustrate) what does that look like?”...“Right.”

“When the blower turns on, where does that go? (Let the customer answer the question then reply) that's right. It gets distributed throughout your home. Could this be contributing to your the allergy symptoms, dust and odors?”

“When we install your system, we will set the indoor unit on a plastic pad that will serve as a moisture barrier to prevent this from happening. Can you see how that will reduce allergy triggers, dust and odors in your home?”

**Restricted return air drop (Return duct drop too small):**

“The heating and air-conditioning blower pulls air from the house through return air grills, into the return air ductwork, then it enters the return air drop which connects the ductwork to the blower compartment. If any part of that return system, the grills, the ductwork or the return air drop is too small, your heating and air-conditioning system will have to work harder to circulate enough air to keep your home comfortable. Improperly sized duct work causes increased operating costs, excessive dust, longer run times, reduce heating and cooling capacity and uneven temperatures in the home.”

Let me give you an example:

“Imagine trying to breathe through a coffee stirrer straw.

You have to agree that would be a very difficult task right? That is how hard your blower has to work when the ductwork is too small. Can you see how that is creating some of the problems you are experiencing?”

Now imagine breathing through a big gulp straw. That would be much easier and much more comfortable wouldn't it?” You would have to agree that properly sizing the return drop will help your new system perform much better than if the duct design were left the way it is, right?”

“When we install the proper signs return air ductwork to your new furnace, your system will be quieter, filter the air better, maintain better temperature throughout your home and cost less to operate. Does that make sense?”

#### Leaking ducts in unconditioned attic space:

I found several leaks in the ductwork as you can see by these photographs. There are 15 to 20 holes just like these. Each hole represents about 1% of the air that is being pulled from your attic. So, if we add up all of the 15 holes I found, what percentage of the air is being distributed into your home from your attic?

What temperature is your attic in the summer?...and in the winter? Right.

Can you see how much harder your system has to work to keep your home comfortable if 15% of the air it is heating or cooling is coming from the attic? Not to mention the additional cost of operation.

What else is in your attic?

What kind of insulation is this? Right.

The ductwork is also pulling insulation, dirt, dust and allergens from the attic area, into your filter. Now, (hold up the air filter) we can literally see through this filter. In fact, if we poured salt on this filter, the salt would fall right through, right?

Can you imagine how much of the dust, insulation particles and allergen particles have been blowing through your filter and distributed through your home?

To make matters worse, 15 to 20% of the conditioned air that should be going into your home is being lost into your attic because of the leaks on the supply ductwork. That reduces the capacity of your furnace and air conditioner by 15 to 20% which makes it difficult to maintain even temperatures and may cause the home to be uncomfortable in extreme temperatures.

Can you see how sealing and insulating the ductwork and installing a hospital grade air filter along with an airtight filter cabinet will: Reduce allergy triggers, Minimize dust, Help even out hot and cold spots and reduce operating cost?



**Dominant decision maker.**

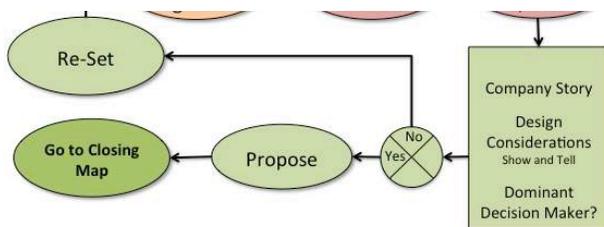
If you aren't speaking to the dominant decision maker, the likelihood of closing the sale isn't as great as if you were speaking to the dominant decision maker. Lets review a few key areas of the sales process that deal with flushing out the dominant decision maker before we get into the closing road map.

After the Design Considerations step, before you review any pricing options; determine if you are speaking to *the dominant decision maker* by asking:

“ Does everything make sense? Can you see how what we are proposing will help you accomplish all of your goals?” Then ask:

“Before we design your new system and arrive at the price, should we check with (other person of interest) to make sure we don't miss anything that might be important to them?”

Let the customer qualify him or herself. The answer to that question will tell you weather you should move forward with reviewing the price or re-set another appointment with the dominant decision maker present.



**How to re-set:**

If the customer says yes, we probably should check with (person of interest), Reply: “It would be my pleasure to drop by and review everything with both of you just to make sure we don't miss anything. When's the next available date and time you and (person of interest) would be available?”

If the customer says: "No, lets go ahead and review the options":

- Follow the "Propose" process
- Help them make decisions that are in their best interest
- 

**Reviewing system options and Asking For The Order:**

"Ok, lets review your equipment options."

Weather you use an electronic format or manual format, put everything on the table in front of your customer and give them the opportunity to study all of the information while you explain what makes up the price. Your customer should be "studying" this information:

<b>Customer Goals</b>		Carol & Tom Withman 11945 Hoster Rd. Carmel IN. 46033		
1. Reduce allergy triggers 2. Make upstairs bedroom comfortable 3. Reduce noise & operating expense				
<b>Code &amp; Safety Issues</b>		<b>Required System Size</b>		
New Synchro Circuit New AC Safety Switch Water Heater Flux Valve		Heating BTU 90,000	Cooling Tons / BTU 3 TON	
*Included in Price*				
<b>System Options</b>				
	<b>Best</b>	<b>Better</b>	<b>Good</b>	<b>Base</b>
Features Variable Air	Yes	Yes	—	—
Variable AC	6G Stage	2-Stage	—	—
Modulating Heat	6G Stage	2-Stage	2-Stage	—
De-humidification stage	Yes	Partial	—	—
10-Year Projected Savings	6,500	5,500	3,600	2,300
<b>Total Investment</b>	20,315 <sup>00</sup>	18,632 <sup>00</sup>	14,107 <sup>00</sup>	9,055 <sup>00</sup>
<b>Minus Credits</b>	-2,000 <sup>00</sup>	-1,000 <sup>00</sup>	—	—
<b>Net Investment</b>	18,315 <sup>00</sup>	17,632 <sup>00</sup>	14,107 <sup>00</sup>	9,055 <sup>00</sup>
<b>Monthly Payment</b>	550	425	400	250
<b>Minus Savings</b>	-28	-25	-15	-11
<b>Net Monthly Investment</b>	522	400	385	239
<b>Additional Work / Enhancements</b> *Included in Price				
Whole house humidifier Germicidal U.V. Light Duct Sealing & Insulating Health Care grade Air Filter Easy Flow Air Return		External Filter Rack Line-Set, Pad, Disconnect Whip All Necessary duct Transitions Documented Safety & Code issues Vapor & Noise Isolation Pad		

Take your time and understand that your customer is more interested in studying the prices instead of listening to what you are saying. That's ok. Let them take it in while you explain:

"The price is made up of four things:

1. Code and safety issues.
2. The required size of equipment.
3. The type of system you want along with the installed prices.
4. The additional work required to accomplish everything on your list of goals.

No matter which system you choose...  
Pause...

Place over the options worksheet until they make eye contact, then say

"Any of these systems will do a great job compared to what you have"

Wait for their "sigh of relief" and ask

"May I show you the system that will do the Best job for you?"

Your customer will either say, "Yes" or tell you that they would rather look at one of the other three options. More often than not, they will likely want to hear about the Best. Once they hear what the Best can do for them, every other option will be weighed against what they will be giving up by not selecting the best.

The next step is simply to review the features of the system they're interested in and make the connection between the features and their list of goals.

Example:

“ This is the system that will do the best job for you.

As you can see, it has a variable capacity air-conditioning, modulating heat and variable airflow.”

Variable airflow helps minimize temperature swings by gradually increasing the airflow on a call for heating or cooling instead of forcing air out of your vents at full speed before your system had a chance to condition it. You can also set the blower to circulate the air at a very low speed during the off cycles which will maintain a more even temperature as well as clean and purify the air 24/7 instead of limiting healthy air circulation, cleaning and purifying to a call for heating or cooling.

A properly sized air conditioner will maintain a (insert your number here) 72-degree indoor temperature at a (insert your number here) 100-degree outdoor temperature. Your home requires 3 tons of cooling.

Air conditioners fall under three classifications: single stage, two stage and variable stage.

What percentage of the days your air conditioner operated last year was close 100 degrees outside?

Right... On average, 20% to 30% of the time. In fact, the median summer temperature in our area is 80 degrees. On a humid 80 degree summer day, your three-ton air conditioner cycles on, cools the house quickly because it is designed to handle a 100 degree day, resulting in poor humidity control and higher operating cost. Have you ever experiences an 80-degree day where the temperature is satisfied but it still feels humid and uncomfortable? That's why.

A variable speed air conditioner has 66 stages of cooling, paired with a variable airflow blower. This system will match the proper capacity (speed) of the air conditioner and airflow to the outdoor conditions. Once the temperature in the home is satisfied, then, it will check the relative humidity and shift to a dehumidification cycle to maintain a more comfortable and healthy humidity level in the home, delivering clean, crisp and fresh air. And by the way, this is the quietest, most efficient system in its class available today.

A properly sized furnace will maintain a (insert your number here) 68-degree indoor temperature at a (insert your number here) -10-degree outdoor temperature. Your home requires 90,000 BTU's of heating.

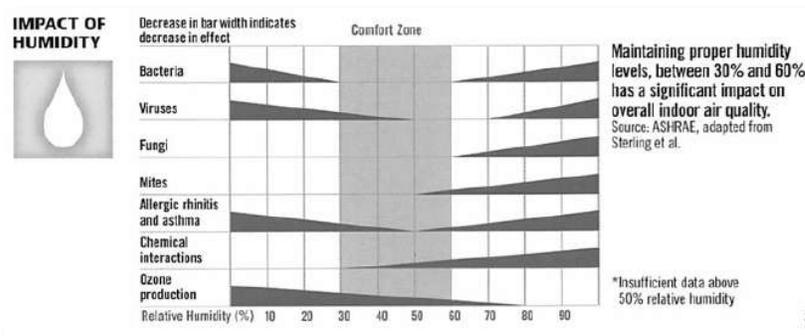
Gas furnaces fall under three classifications: single stage, two stage and variable stage.

What percentage of the days your furnace operated last year was close -10 degrees outside?

Right... On average, 20% to 30% of the time. In fact, the median winter temperature in our area is 25 degrees. On a cool 25 degree winter day, your 90,000 BTU furnace cycles on, heats the house up quickly because it is designed to handle a -10 degree day, resulting in dry, drafty air and higher operating cost.

A variable speed furnace has 66 stages of heating, paired with a variable airflow blower. This system will match the proper capacity (speed) of the furnace and airflow to the outdoor conditions. Once the temperature in the home is satisfied, then, it can (optional) shift to a air circulation cycle to maintain a more comfortable and healthy humidity level in the home, when paired with a whole house humidifier and health care grade air filter, delivering clean, crisp and fresh air. And by the way, this is the quietest, most efficient system in its class available today.

As you can see,



Managing the relative in your home between 35% and 55% will not only reduce odors, it will also reduce allergy and asthma triggers and reduce the spread of bacteria and Viruses.

Reducing allergy triggers was a top priority for you right?

Mold is an allergen. Mold (Fungi) produces allergens when it grows. When mold stops growing, it stops producing allergens. Mold (Fungi) stops growing when the relative humidity is below 50%. Above 50% it produces allergens. Below 50% it does not.

Have you ever heard of a dust mite?

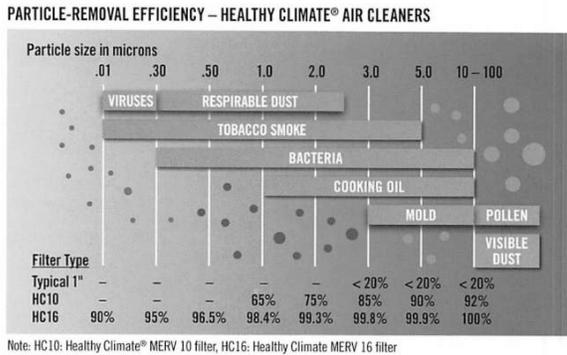
Dust mites are microscopic bugs that feed on pet dander, hair and skin. Fecal matter secretion from dust mites trigger allergies. Dust mites hydrate themselves by absorbing moisture from the humidity in the air. If the relative humidity falls below 50%, dust mites cant hydrate and they die.

Bacteria, Viruses and Asthma symptoms flourish when the relative humidity is below 35% in the winter (Dry) and above 60% in the summer (humid). When we control and regulate the relative humidity in the home between 50% in the summer

months and above 35% in the winter, Allergy triggers, asthma triggers and odors are reduced.

Can you see how designing a system that can control and regulate the humidity in your home will make your home healthier and more comfortable?

Now, to finish the job, we will incorporate a Health grade air filter:



I've selected the Pure air system because, as you can see, It performs better than other filters in its class.

**UNMATCHED CLEANING POWER OF THE PUREAIR™ SYSTEM, COMPARED TO OTHER TECHNOLOGIES**

	PureAir™ System	Active Carbon Filter	HEPA Filter	High-Energy UVC Light	Standard Box Filter	Electronic Air Cleaners
Captures small, breathable particles down to 0.3 micron	•		•			•
Captures airborne mold and other bioaerosols down to 0.01 micron	•		•			
Destroys odors (cooking fumes, pet odors)	•	• <sup>1</sup>				
Removes chemical vapors (fumes from household products)	•	• <sup>1</sup>				
Reduces ozone	•	•				
Does not generate ozone	•	•	•	• <sup>2</sup>	•	
Whole-home hospital-grade filtration	•					
Low operating cost	•	•		•	•	

<sup>1</sup>Only captures, does not destroy  
<sup>2</sup>With use of non-ozone lamps.

Dave Lennox Signature® Collection PureAir™ Air Purification Systems			
	PC014-23	PC016-28	PC020-28
Precision Pleat™ Filter	MERV 16	MERV 16	MERV 16
Filter Life	Up to One Full Year*	Up to One Full Year*	Up to One Full Year*
Lamp Life	2 Lamps/1 Year	2 Lamps/1 Year	2 Lamps/1 Year
Insert Life	1 Year	1 Year	1 Year
Electrical Rating	120/230V; 50/60 Hz; 150 watts; 1.2/65 amps	120/230V; 50/60 Hz; 150 watts; 1.2/65 amps	120/230V; 50/60 Hz; 150 watts; 1.2/65 amps
Dimensions HxWxD (in.)	21-1/8 x 10 x 23	17-1/4 x 10 x 28-1/2	21-1/8 x 10 x 28-1/2
HxWxD (mm)	540 x 254 x 584	438 x 254 x 724	540 x 254 x 724

\*Based on average hours of fan operation from six cities when thermostats are placed on "auto" versus "continuous" fan. More frequent filter changes may be required in situations with high dust or dirt loads.

“Can you see how this system along with the additional work will accomplish everything on your list of goals?” “Does everything make sense?”

At this point, your customer will do one of three things:

1. Have an emotional reaction to the price.
2. Ask if they can see another less expensive option.
3. Say YES everything makes sense.

Lets review how to handle each one before we Ask For The Order.

**1. An Emotional reaction to the price:**

“This is way more than I was wanting to pay”.

Right now, your customer is feeling out of control of the situation. Your job is to keep them in control of buying. This is how to put them back in control:

“I understand, the price is based upon the system size, the type of system you choose and how much of the additional work makes sense for you to do right now.”  
How far out of range is the price?”

Wait for the answer...

“Ok, If we are able to arrive at a price that you are comfortable with by revisiting the equipment selection and additional work... Would there be any reason no to schedule the work?”

If they say No... work them through a re-design until they are comfortable moving forward.

If they indicate any “other reasons” for not scheduling the work, follow the appropriate approach covered in the process following this section.

**2. They want to see another less expensive option.**

Ask them which one they would like to take a closer look at and walk them through an explanation.

**3. They say YES everything makes sense**

co to the replacement-closing map

## Replacement Sales Process

S. Set the stage

C. Customer Assessment

O. Operational Assessment

R. Review Options

E. Encourage

