

Discovery and Rapport

The Sales Process Discovery and Rapport



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Prepare for the call

- **Pre – load all Customer Information**

- **Prepare your sales folder.**

- **Call your Customer**

“Hi this is (name) With (company)”

- **Confirm appointment time**

“Just confirming our appointment for (time) (date).”

- **Establish a time commitment (60 – 90 minutes)**

*“This will take about 60 to 90 minutes,
Are we ok on time?”*

- **Pay attention to their Personality style**

- **Get them talking about What they want.**

*“I understand that your wanting to
Upgrade your HVAC system.
Tell me about that”.*

- **(listen to Understand)**

“I can help you with that.”

*“Is there anything else I can
help you with before
our appointment?”*

First Impression & Warm Up

- **Show up a few minutes Early - Park out of the way.**
- **Respect their property. Look like someone worth listening to.**
- **You have 3 seconds to make**
- **a Great 1st impression.**
- **Knock on the door**
- **Greet your customer**

*Hi I'm (State Name) from (Company) and you are?
Pleasure to meet you. (hand them your business card)
Am I parked out of the way?
May I come in?*

- **Develop Professional Rapport (Common Ground)**

*"Tell me why you are wanting to upgrade your system"
(Listen to understand)*

- **Discover your customers mindset regarding "Contractors"**

*"Have you had any experience with Contractors before?
Tell me about that."*

"Sorry you had that. I've had a few bad experiences too and I can assure you that you wont have to worry about that with us."

- **Time Commitment**

"Ill need about 60 to 90 minutes, are we ok on time?"

- **Place to work**

"Would there be a tabletop I could use to prepare your folder?"

- **Person of Interest**

"Will anyone else interested in the System and Price be joining us?"

Explain the Agenda

- **Explain the Agenda**

“The next step is to assesses your system.”

“It will take me about 35 to 40 minutes to take some measurements and evaluate your system.”

“I might need access to different areas of your home to check for proper airflow. Is there any area of your home you prefer I not evaluate?”

Once I finish, Ill need about 15 to 20 minutes to prepare your Job folder here at the table.”

“Once I have everything prepared, Ill show you what I’ve found – Review the different system features that are available and work with you until you are comfortable with the system design and price.”

- **Test the Waters**

“Once we decide what system makes sense for you, we can schedule the work.”

- **If the Customer says “I'm not making any decisions tonight” Put your customer in control of the situation..**

“I would never expect you do do anything that didn’t make sense.”

- **Transition into Setting goals**

“To make sure I don’t miss anything during the assessment, I need to ask a few questions.”

Establish a Written list of Goals

- **Transition into Setting goals**

“To make sure I don’t miss anything during the assessment, I need to ask a few questions.”

- **Ask the right Questions**

“Who in your home suffers from Allergies, Asthma, Hay Fever or respiratory issues?”

“Which areas of your home are difficult to heat or cool?”

“Where in your home do you notice noise from your HVAC system?”

“How often does your home feel humid in the warmer months?”

“How often does your feel dry during the cooler months?”

- **Listen to Understand**

*“Tell me about that”
How long has this been going on?”*

- **Express some Empathy**

“ That must be miserable. Sorry your having that experience.”

- **Establish their goal...**

*“What I'm hearing you say is you want to...
Reduce Allergy Triggers – Make the (Room) more Comfortable –
Minimize noise*

If we could do that for you, would you be interested?

Ok, Let me write that down.

Transition into your evaluation of the home

“Im ready to evaluate the home. Your welcome to come along if you like pr we can split apare and Ill find you when Im finished”. Coud you show me where your thermostat and equipment is?”

Complete your Home Survey

- **Home Survey**
 - **Complete your Technical Home Survey**
 - **Determine what it will take to accomplish their goals.**
 - **Evidence problems with photographs – video's – and or 3rd party references.**
 - **Determine what your customer needs to see and hear to believe that you can solve their problem.**
 - **Compile all of your information into a presentation.**
 - **Complete your presentation in the home and make yourself accessible if the customer wants to interact with you.**
 - **Complete your Heating and cooling load calculations.**
 - **Complete your pricing options. (Include the retail price and financed monthly payment.**
 - **Determine what dates are available for an Install.**
 - **Create a job folder.**
 - **RE-Engage with your customer**

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 - **RE-Engage with your customer**