Trane Boot Camp

MAXIMAZATION PLAN

No Pressure Selling®

Trane Boot Camp Maximization Checklist

No Pressure Selling®

DEALER: ________________ DEALER #: ________________

CONTACT: ________________ PHONE: ________________

Step 1: Pre-Class Phone Call

- ☐ 5-10 min. Phone Call - Immediately After Registering

Step 2: Pre-Class Meeting

- ☐ 30-60 min. Face-to-Face Meeting - One Week Before Class

Step 3: Daily Debrief Meetings During Trane Boot Camp

- ☐ 15-30 min. Phone Call or Face-to-Face Meeting - After Day 1
- ☐ 15-30 min. Phone Call or Face-to-Face Meeting - After Day 2
- ☐ 15-30 min. Phone Call or Face-to-Face Meeting - After Day 3

Step 4: Last Day of Boot Camp

- ☐ 30-60 min. Phone Call or Face-to-Face Meeting - After Day 4

Step 5: Post-Class Meeting

- ☐ 60-90 min. Face-to-Face Meeting - 2-3 Days After Trane Boot Camp

Step 6: Post-Class Meeting

- ☐ 60-90 min. Face-to-Face Meeting - 1 Week After Trane Boot Camp

Step 7: Appointment Debrief Phone Call

- ☐ 5-10 min. Phone Call - After First Sales Appointment
- ☐ 5-10 min. Phone Call - After Third Sales Appointment

Step 8: Monthly Review

- ☐ 60-90 min. Face-to-Face Meeting - 1 Month After Trane Boot Camp

Step 9: Company Profile Book

- ☐ 60-90 min. Face-to-Face Meeting - Monthly

Step 10: Ride-Along With Comfort Consultant

- ☐ 90-180 min. Ride-Along - Quarterly

Boot Camp Maximization Time Line

Step 1: Immediately After Dealer Registers for Boot Camp

Before you call

- Have the following information ready for your dealer
- Address for Boot Camp meeting location
- Start time each day, typically 8:00 am each day
- Block of rooms available at the hotel, if applicable
- Is there a contact person and phone number for booking rooms?
- Suggested airport to fly into, if applicable
- Plan on flying in night before class, leaving the afternoon of the last day

Phone call (5 -10 minutes)

The goal of this phone call is to get your dealer excited about attending Boot Camp, let them know you are there to support and address any concerns they may have. It is important to make yourself available whenever, wherever to help your dealer through the Boot Camp process. If needed, this may be a good time to cover some of the logistics with your dealer relative to flight, hotel, etc.

Keys to cover:

- Briefly discuss logistics if the class will be held off-site
- Where is it?
- What time will it start/finish?
- What is the suggested airport?
- Schedule pre-class meeting (1 week before Boot Camp)
- Schedule time for you to attend with your dealer(s)

IMPORTANT:

Typically, dealers who are willing to invest the time and money to attend Boot Camp will be the dealers with the most growth opportunity. There is no better way to capitalize on this opportunity than spending 4-days to build your relationships with these dealers. Taking the time to focus on them, in person or via phone, will pay dividends in mix shift, brand penetration, and overall dealer loyalty.

Step 1: Immediately after dealer registers

(5-10 Minute Phone Call)

Date: ______________________ Time: ____________

Dealer: ____ Dealer #: _______________

Contact: ____________________________ Phone Number: (___)_____ - _______

Minutes	Material to be covered	Information Discussed
1	Greetings	
2	Class logistics	
1	Schedule pre-class meeting	
1	Schedule time to attend/call dealer	
1	Wrap-up	

Meeting Objectives	Results
Get dealer excited	
Offer support	
Answer questions	

Action Items	Results
Book flight (if applicable)	
Book hotel (if applicable)	

Step 2: Pre-class Meeting (1 week before Boot Camp)

Before your meeting

✓ Know what your dealer can expect
- Four full days of training
- Non-intimidating skills practice
- Best practices
- Tools for immediate implementation of the No Pressure Selling® Process

✓ Does your dealer need make flight/hotel reservations?

✓ Confirm business owner/manager attendance

✓ Review your calendar to ensure availability for the follow-up meetings with your dealer

Face to Face meeting (30-60 minutes)

This will let your dealer know what they can expect from Boot Camp, and more importantly from you, during Boot Camp. The goal of this meeting is getting your dealer ready to take full advantage of the Boot Camp, address any concerns, and layout your implementation plan.

This meeting

Help your dealer understand what to expect. They will need to bring some materials to the Trane Boot Camp. We recommend:

- Pen
- Calculator
- Notepad

Dress code for Trane Boot Camp

Boot Camp is a full day of training, be comfortable. There will be skills practice of the actual sales call; we recommend participants dress like they would for an in-home presentation, especially on the last day.

Your dealers will NOT be bombarded with intimidating role-play situations. The skills practice used in Boot Camp is designed to foster learning, not to build the instructor's ego. Participants should look forward to the experience.

Help dealers realize the immediate impact that will be made on their business. In most cases, the investment in the program can be made back in the first two weeks after attending the program.

Address the fact that when done properly, the No Pressure Selling® Process can take 1-3 hours in the home, depending on the number of questions customers ask.

Keys to cover:

- Review location, dates, times
- Review Agenda and Expectations
- Set goals for the training

  These goals will be different depending on your dealer's familiarity with the No Pressure Selling® Process. For example, goals will be different for a dealer attending Boot Camp for the first time than someone attending for a 4th time.
- Schedule daily after class meetings for every day of Boot Camp
- Schedule post class meeting
- Layout calendar for meetings/phone calls for next 30-45 days – **include worksheet**

Step 2: Pre-class Meeting

(60-90 minute face-to-face meeting)

Date: ________________________ Time: _____________

Dealer: ____ Dealer #: ________________

Contact: _______________________________ Phone Number: (___)_____ - _______

Minutes	Material to be covered	Information Discussed
2-5	Greetings	
2-5	Review logistics, agenda and expectations	
10-15	Cover ROI calculation table, if applicable	
5-10	Set goals for training	
5-10	Schedule daily follow-up calls or meetings	
2-5	Schedule post class meeting	
10-15	Layout plan for next 30-45 days	
2-5	BOOT CAMP dress code	
2-5	Materials needed for Boot Camp	
5-10	Discussion on skills practice	
2-5	Wrap-up	

Meeting Objectives	Results
Discuss expectations	
Address concerns	
Get dealer comfortable with role-play	
Get dealer excited	

Action Items	Results
Confirm flight (if applicable)	
Confirm hotel (if applicable)	
Review implementation plan	

Step 3: Daily Debrief Meetings during Boot Camp (Days 1-3)

After class debrief Meeting (15-30 minutes)
Boot Camp is an intense four days. Your dealer will be given a lot of information to digest every day. Reviewing after each day with your dealer will help flush out concerns while they are fresh in your dealer's mind and help you ensure long-term success.

In the unlikely event that you are unable to attend Boot Camp with your dealers, you can schedule a phone call at the conclusion of each day.

Day 1: The first day of Boot Camp is predominately instructor lecture. The goal of this day is to help dealers open themselves up to the idea of selling on comfort rather than price. For some first-time participants, this is a completely different way to sell. You may be getting some level of push back from your dealer. Don't worry if they're not totally bought in at this point. Just be sure to address concerns, answer questions, and help with homework. If you get a question you can't answer, pull the instructor aside and have him address it.

Day 1 Review
- 3 Rules to Selling Value
- Feature Benefits of the Trane product line
- No Pressure Selling®
- Role-play the Comfort Concerns List© to get ready for tomorrow

Day 2: The second day of Boot Camp gives dealers a chance to practice the No Pressure Selling® presentation as they would in the home. As they practice asking the Comfort Concerns© and making a benefit focused presentation, their confidence begins to build. At the end of the day, participants are introduced to the Wheel of Value© and Estimated Energy Savings©.

Day 2 Review
- No Pressure Selling tools
  - Comfort Concerns List©, Wheel of Value©, Estimated Energy Savings©
- Role-play complete in-home presentation
- Practice transitional phrases for tomorrow

Day 3: The third day of Boot Camp gives participants another chance to practice the presentation, but this time, focuses more on developing their ability to handle objections. This is typically the day where you will see the "light bulb" go on as your dealers begin to see themselves using this process across the kitchen table.

Day 3 Review
- Review transitional phrases
- Review 4 D's
- Practice complete in-home presentation with objections for final role-play tomorrow

Step 3: Daily Debrief Meetings

(15-30 minute phone call or face-to-face meeting)

Date: ________________________ Time: _____________

Dealer: ____ Dealer #: _________________

Contact: _______________________________ Phone Number: (___)_____ - ________

Minutes	Material to be covered	Information Discussed
2-5	3 rules to selling value (day 1)	
2-5	Feature benefits of the Trane product line	
5-10	No Pressure Selling®	
15-20	Role-play the Comfort Concerns List®	
15-20	No Pressure Selling® tools (day 2)	
20-30	Role-play complete in-home presentation	
10-15	Practice transitional phrases (day 3)	
10-15	Review 3D's	
20-30	Practice complete in-home presentation	
15-20	Practice handling objections with presentation	

Objectives	Results
Review goals	
Address concerns	
Complete homework for next day	
Flush out parts of presentation needing work	

Action Items	Champion

Step 4: Last Day of Boot Camp

Before your meeting

- Review your notes from the 4 days
- Review your calendar

After class debrief Meeting (30-60 minutes)

Most participants leave Boot Camp confident, and motivated to sell the "good stuff". They see immediate success as they implement every step of the process. Eventually, some Boot Camp graduates will deviate slightly from the process, and begin to see diminished results. This is sometimes called the "Boot Camp Spike".

Your interaction with your dealer over the next 30 days can help you eliminate this spike and ensure implementation. As soon as class is over, either in the room with the instructor or on the trip home, take time to debrief with your dealer.

Step 4: Last Day of BOOT CAMP Debrief Meeting

(30-60 minute phone call or face-to-face meeting)

Date: ________________________ Time: _____________

Dealer: ____ Dealer #: ________________

Contact: _______________________________ Phone Number: (___)_____ - _______

Minutes	Material to be covered	Information Discussed
2-5	Confirm meeting for the following Monday	
5-10	Review goals from pre-BOOT CAMP meeting	
10-15	Address any concerns or questions	
15-20	Put together a custom implementation timeline	
5-10	Confirm dealer's first opportunity to use process	
10-15	Discuss "BOOT CAMP spike"	

Objectives	Results
Review goals	
Address concerns	
Flush out immediate dealer objections	

Action Items	Champion

Step 5: Post-class Meeting (2-3 days after Boot Camp)

Before your meeting

- Print copy of custom implementation plan
- Stock up on necessary literature
- Heat load calculation form
- In-home survey form
- Research digital cameras
- Current financing promotions and programs available
- Review "to be successful sections of Step 5"

Face to Face (60 – 90 minutes)

This is your chance to get the "unvarnished" evaluation of the training from your dealer. If they implement this process, you will both enjoy incredible success. At this meeting, your goal is to flush out any concerns your dealer has, and eliminate roadblocks to implementing the process. You've got to ask questions to find out if they're comfortable with every step. Implementation is essential. Without your help, dealers may struggle with the implementation and end up not utilizing the process.

Just like system start-up, No Pressure Selling® is a PROCESS. If steps are skipped, results will suffer. This is your chance to discover any steps in the process your dealer is struggling with. Remember, if there is any question you cannot answer, help is just a phone call away. If your dealer gets back, and tells you something about the process does not make sense, call The ACT Group (800.515.0034) for help.

This is the most important meeting of the entire process. Keep in mind the goal is to eliminate, not create, roadblocks. As you ask questions, if you get a lot of "no" answers, stop. The most important thing your dealer can do is get out there and use the process. Don't give them an excuse like not having a Company Profile Book, to avoid using the process.

Keys to cover:

- Make sure dealer is comfortable with the process
- Make sure laminated sheet, No Pressure Selling® triangle, is hung somewhere it can be reviewed regularly

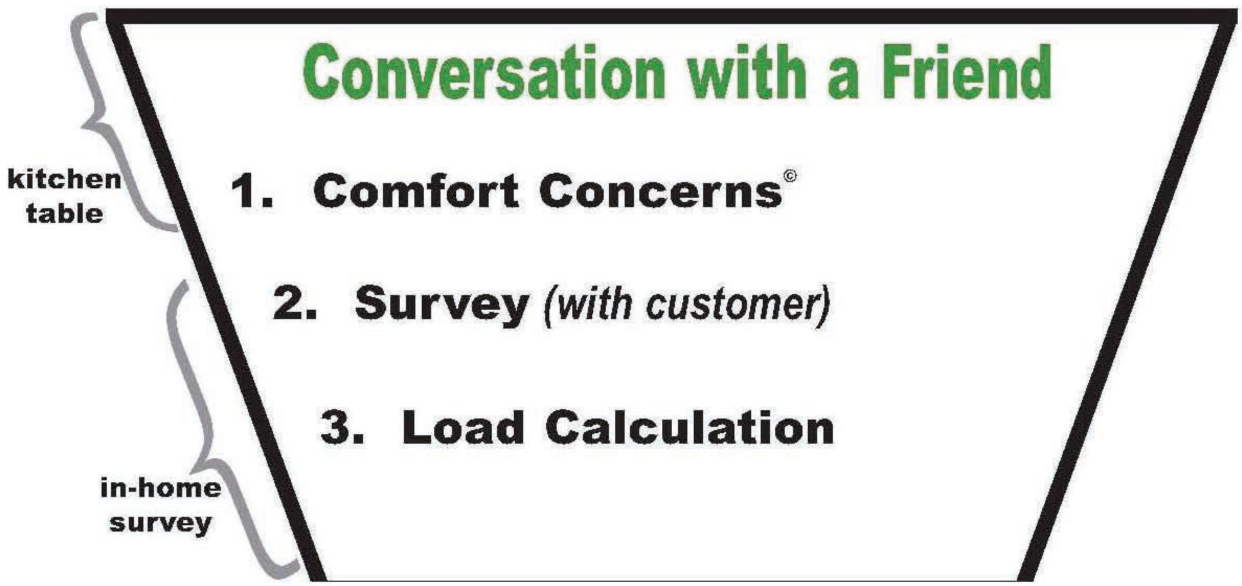
Overall objections to implementation

- I don't have time to spend 1-2 hours in the home

This is a bit of a test of your relationship with the dealer. If you've established yourself as a business consultant, and No Pressure Selling® coach, then you can reference the goals, let them know that it takes 2 hours to sell up, selling up is key to profitable growth, and making the transition from working in the business to working on the business.

If the owner just sent a salesperson, this process will die. It is your job to "sell" the owner on the fact that his consultant needs 90-120 minutes in the home.

Discovering Opportunities



What are dealer's biggest objections to implementing this part of the process?

Initial Greeting

Does your dealer have everything they need to make a positive first impression? Keys to success here include the pre-call material covered in Boot Camp. Review the importance of parking in the street, knocking on the door, and taking three steps back.

To be successful, your dealer will need:

- Business cards
- Shoe covers

Comfort Concerns List©

Does the dealer see the value of doing a needs analysis? Stress the importance of asking the questions. It doesn't matter how they ask them, or what questions they ask. If they aren't comfortable asking about Energy Savings, then don't ask it. Make sure this exercise doesn't turn into "mall survey". This needs to be done at the kitchen table, there's just no way around it.

To be successful, your dealer will need:

- Copies of the Comfort Concerns List©
- Ball point pen
- Legal pad

In-home survey & Heat Load

What does your dealer currently use to complete this step in the process? This does not need to be a specific, customized, or special form. The in-home survey can be completed on a simple sheet of graph paper. Why do we do the in-home survey? How can we set ourselves apart during the survey? We need to get the customer involved in this part of the process. Key is to tie the CCL to the survey. "This must be Johnny's room; it does seem a little warmer. This is the time to look for duct modifications. Do we need to upsize the return?

Dealers leave Boot Camp knowing they need to do a heat load on every job. The truth of the matter is, most don't know how. This is mentioned in the presentation binder. If your dealer doesn't know how to do a heat load, they may not use the presentation binder, or may disregard the entire process. Flush out this concern and teach your dealer to perform the calculation if necessary. Again, this form can be simple, as long as it is done correctly. The key here is to eliminate objections, like we need to purchase software, to getting out there and trying the No Pressure Selling® Process.

To be successful, your dealer will need:

- Tape Measure
- Laser Tape
- Survey Form
- Heat loss/gain form
- Digital Camera

Quiet Time / Company Profile

What are the biggest dealer concerns to using this part of the process?

Organizing the Presentation Binder

This is a step in the process that often gets overlooked. In order to prepare for their presentation, your dealer needs to have the right literature ready to insert into the presentation binder. A quick check before heading into the customer's home can help avoid an awkward run to the truck to track down literature during this part of the presentation.

To be successful, your dealer will need:
- Product Literature
- Financing information/applications if necessary

Benefits of the Trane product

Quiet time is where your dealer will be matching the benefits the customer requested in the CCL to their product recommendation. We all do what we are most comfortable with. Presenting these benefits was discussed in depth at Boot Camp, but you can help by reviewing the features with your dealer. Taking the time to review will help your dealer select the right system, based on the homeowner's answers to the Comfort Concerns©.

To be successful, your dealer will need:
- Proposals
- Product Literature
- Preston's Guide

Company Profile Book

Truth of the matter is, unless they already have one put together, this takes a lot of time to complete. Don't let this be an objection to implementing the process. It doesn't make sense to talk about this until at least 30 days after the class, when they've had a chance to use the process in the field. The Comfort is in the Air spiral bound brochure is a suitable substitute until they have the time to put together a Company Profile Book. Even before they have completed the Company Profile Book, they can benefit from having copies of their BBB history, licenses, background checks, insurance policies, etc.

To be successful, your dealer will need:
- Better Business Bureau information
- Proof of Insurance

Pricing

Offering homeowners the right system to meet their needs is important. Being able to properly price the system is just as important. You can help your dealer build their own “cook book” pricing using resources available from Trane. Do not let pricing be a roadblock to implementation. While it is preferred, your dealer does not need a price book to close the sale. Regardless of the tool used, take time to make sure your dealer can confidently and correctly price Trane comfort systems.

To be successful, your dealer will need:

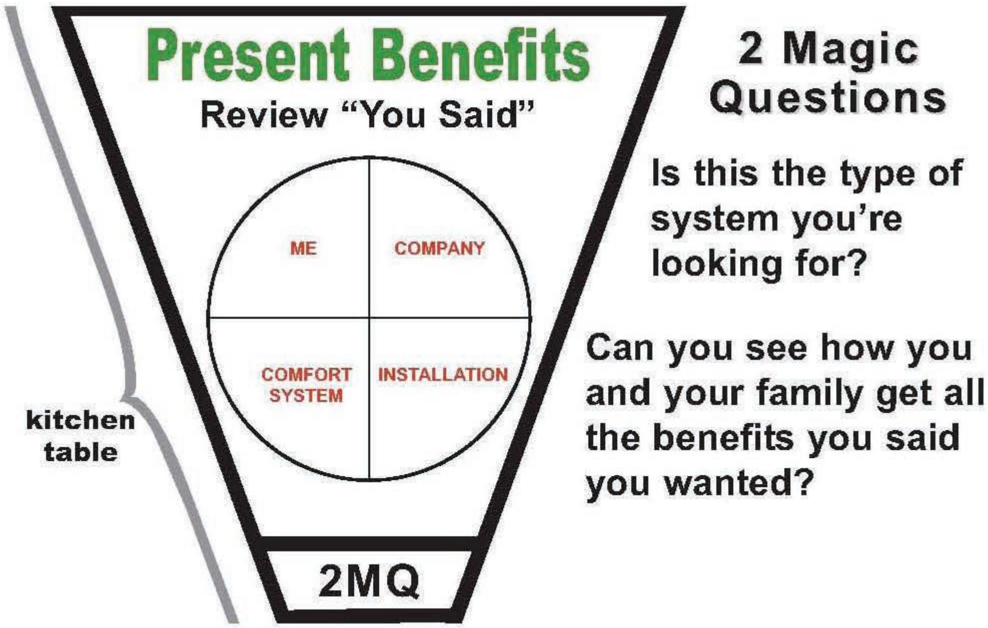
- Proper pricing information

Financing

It's a fact. Dealers who offer financing on every job close more sales and have higher averages. Very few potential customers, regardless of their economic situation, have the ability to write checks for $10,000 to $20,000 comfort systems. People finance for different reasons. For some, it is a matter of convenience, others actually need it. Don't let your dealers lose sales because of financing. Be sure they can confidently offer the most up-to-date information on programs available.

To be successful, your dealer will need:

- Calculator
- Financing information/applications if necessary



What are the biggest dealer concerns to using this part of the process?

Making a Benefit Focused Presentation

During Boot Camp, your dealer had multiple opportunities to practice their professional presentation. This is where the process comes together. The key to the sale is trust, and confidence across the kitchen table helps build that trust. Make sure your dealer can confidently and concisely tell the story of their company, installation, Trane, and themselves.

If you attended Boot Camp together, you practiced the presentation. You may have noticed some opportunities for improvement with their presentation. Work on those together, but keep in mind the presentation does not need to be perfect, just professional.

Make sure your dealer is comfortable with every page in the presentation. If there is a page they don't want to use, help them understand why it's important and how to present it, or let them skip it.

To be successful, your dealer will need:

- Presentation binder
- Dry erase pen

What are the biggest dealer concerns to using this part of the process?

Asking for the Order

At Boot Camp you and your dealer learned the importance of asking for the order. Too often, dealers will get to the end of the presentation and ask, “What do you think?”. This is not a question that leads to closing sales. It doesn't matter whether homeowners are being asked for their approval, authorization, or “okey dokey”, as long as they are being asked at the end of every presentation.

Handling Objections

More often than not, dealers will get some sort of objection. Day 3 of Boot Camp was dedicated to handling any objection using the 4 D's. Review, and make sure your dealer is comfortable with the 4 D's and transitional phrases you learned at Boot Camp. More importantly, be sure your dealer understands the right tool for each type of objection.

After the Call

After every call your dealer should be completing the One Minute Review©. This tool will give you and your dealer an opportunity to review each sales call and analyze the differences between the closed sales and missed opportunity. This form will also help you direct your coaching.

To be successful, your dealer will need:
- One Minute Review©
- Filing system for all paperwork
  - Comfort Concerns List©, proposal, etc.

Keys to cover:
- Review No Pressure Selling© Process
- Find out when your dealer will have first opportunity to use the process
- Confirm next meeting for 1 week after Boot Camp

Step 5: Post-class Meeting

(2-3 days after BOOT CAMP 60-90 minute face-to-face meeting)

Date: ______________________ Time: ____________

Dealer: ____ Dealer #: _______________

Contact: _____________________________ Phone Number: (   )_____ - _______

Minutes	Material to be covered	Information Discussed
2-5	Greetings	
10-15	One Minute Review® from first opportunity in field	
10-15	Objections to implementtion	
15-30	Focus on specific objections (if applicable)	
10-15	Review “to be successful” checklist from each section	
15-30	Skills practice sales presentation	
2-5	Schedule 1 week after BOOT CAMP meeting	
2-5	Wrap-up	

Objectives	Results
Review goals	
Address concerns	
Flush out opportunities for improvement	

Action Items	Champion
Make sure laminated sheet is hung up in office	

Step 6: Monthly Review (1 month after Boot Camp)

Before you meet

- Generate latest Mix Report for dealer
- Print copy of One Minute Review©
- Read Changing the Perception of Role-play

Face to Face meeting (60-90 minutes)

It is important not to overwhelm your dealer, especially if this is the first time they have attended Boot Camp. The goal of these meetings is to review the previous 30 days, and lay the groundwork moving forward. Your monthly meeting and skills practice with your dealer will make the difference between implementing and forgetting about the process. Use these meetings to get your dealer comfortable and confident with the process. This will help reduce or eliminate the "Boot Camp spike". If you have been working specifically with the Comfort Consultant, this may be a good opportunity for you to get the owner/sales manager involved in your meeting and make sure everyone is on the same page.

If you and your dealer have completed the previous steps, they are beginning to see positive results and will be open to hearing your ideas for what's next. Future meetings will take different directions based on your dealer's business as a whole. If you have followed the steps in the previous 30 days, you will have established yourself as a business consultant. As your dealers build trust and confidence in your ability to help grow their business, you may notice them asking more involved questions.

You will help ensure your dealer's, and your, long-term success with consistent coaching. Now that you have taken the time to establish rapport and credibility, you may want to schedule your regular role-plays and ride-alongs.

Step 6: Post-class Meeting (1 week after BOOT CAMP)

(1 week after BOOT CAMP 60-90 minute face-to-face meeting)

Date: ________________________ Time: _____________

Dealer: ____ Dealer #: _________________

Contact: _______________________________ Phone Number: (___)_____ - ________

Minutes	Material to be covered	Information Discussed
2-5	Confirm meeting for the following Monday	
5-15	Review weekly appointments (sold and lost)	
5-15	Review completed One Minute Review® forms	
10-30	Discussion on what's working and what's not	
10-15	TM model presentation (dealer as customer)	
10-30	Skills practice with dealer (TM as customer)	
5-15	When will dealer be using process this week?	
2-5	Wrap-up	

Objectives	Results
Review goals	
Increase dealer comfort with process	
Uncover any additional objections	

Action Items	Champion
Schedule next weekly skills practice meetings	
Schedule follow-up phone calls during week	
Schedule 30 days after BOOT CAMP meeting	

Step 7: Appointment debrief phone calls (2 per week)

Phone Call (5-10 minutes)

The goal of these calls is the same as the Post-class meeting. Find out what is working and what needs to be improved for your dealer. Debrief on the most recent sales appointments. Ideally, your dealer will be calling you after filling out his/her One Minute Review© after each sales appointment during the week to debrief. Deal with concerns and share in your dealer's success.

Be sure to write down what you discussed during each phone call to guide your coaching for the next face to face meeting.

Step 7: Appointment Debrief Phone Call

(5-10 minute phone call after first sales appointment)

Date: ________________________ Time: _____________

Dealer: ____ Dealer #: _________________

Contact: _______________________________ Phone Number: (___)____ - ________

Minutes	Material to be covered	Information Discussed
1	Greetings	
2	Review appointment	
1	Review completed One Minute Review® forms	
1	Discussion on what's working and what's not	
15	Confirm next debrief phone call	

Objectives	Results
Give dealer immediate feedback	

Action Items	Champion
Combine notes from calls to review at weekly meeting	

Step 8: Monthly Review (1 month after BOOT CAMP)

Before you meet

- Generate latest Mix Report for dealer
- Print copy of One Minute Review©
- Read Changing the Perception of Role-play

Face to Face meeting (60-90 minutes)

It is important not to overwhelm your dealer, especially if this is the first time they have attended BOOT CAMP. The goal of these meetings is to review the previous 30 days, and lay the groundwork moving forward. Your monthly meeting and skills practice with your dealer will make the difference between implementing and forgetting about the process. Use these meetings to get your dealer comfortable and confident with the process. This will help reduce or eliminate the "BOOT CAMP spike". If you have been working specifically with the Comfort Consultant, this may be a good opportunity for you to get the owner/sales manager involved in your meeting and make sure everyone is on the same page.

If you and your dealer have completed the previous steps, they are beginning to see positive results and will be open to hearing your ideas for what's next. Future meetings will take different directions based on your dealer's business as a whole. If you have followed the steps in the previous 30 days, you will have established yourself as a business consultant. As your dealers build trust and confidence in your ability to help grow their business, you may notice them asking more involved questions.

You will help ensure your dealer's, and your, long-term success with consistent coaching. Now that you have taken the time to establish rapport and credibility, you may want to schedule your regular role-plays and ride-alongs.

Step 8: Monthly Review Meeting

(Monthly 60-90 minute face-to-face meeting)

Date: ________________________ Time: _____________

Dealer: ____ Dealer #: ________________

Contact: ______________________________ Phone Number: (___)_____ - _______

Minutes	Material to be covered	Information Discussed
2-5	Confirm meeting for the following Monday	
10-15	Review monthly sales appointments	
15-20	Review monthly mix report	
5-10	Latest marketing/financing programs available	
15-20	No Pressure Selling® skills practice	
5-10	Custom sales presentation binder updates	
2-5	Wrap-up	

Objectives	Results
Flush out any objections to the process	

Action Items	Champion
Schedule next monthly review	
Schedule Company Profile Book meeting	
Send meeting ‘minutes’ to all attendees	

Step 9: Company Profile Book

Before your meeting

- Find a digital camera
- Review Company Profile Checklist (see worksheet)
- Gather any generic preliminary information you can find
  - ✓ Better Business Bureau report for your dealer
  - ✓ Registrar of Contractors information
  - ✓ Photos of bad installs (check www.hvac-talk.com wall of shame)
  - ✓ Latest information telling the Trane story
  - ✓ Local utility company information relative to rates/rebates
  - ✓ Department of Energy information

Face to Face meeting (60-90 minutes)

The first 30-120 days after BOOT CAMP should be spent perfecting the in-home presentation. An BOOT CAMP graduate making a consistent, professional, benefit-focused presentation will close more high-margin sales. Each page of the sales presentation binder has been specifically designed and streamlined to help dealers sell the company, installation, and themselves in addition to the comfort system. Make sure your dealer can confidently present the benefits of all four before beginning work on the Company Profile Book.

After your dealer is comfortable with the sales presentation binder, it may be time to look at creating the Company Profile Book. This book serves as a "self-guided tour of the company" for homeowners to go through while your dealer completes the heat load and fills in the proposal. The key here is "self-guided". In order to be effective, each page, and each image on the page, should be clearly labeled and explained in bold letters. If homeowners cannot clearly see what's going on, they will lose interest and the Profile Book will lose value.

Despite the importance of getting it put together, most business owners and comfort consultants struggle to complete the Company Profile Book. Most of the time, you, the business consultant/coach, will be the one assigning tasks, and helping get the book completed. Do not be discouraged if it takes weeks/months to complete. Continue to help your dealer see the importance of keeping customers at the kitchen table by giving them something to do, and helping those customers sell themselves even before the sales presentation begins.

Just like eating an elephant one bite at a time, the Company Profile Book needs to be broken down into "bite-size" pieces if it is going to get done. Review each point on the Company Profile Book checklist with your dealer and decide together what needs to be done to build the value of that point in homeowners' minds. Would pictures best make the point? If so, what should be included in the pictures? For instance, an ideal installation picture should include not only the system, but a clear view of the rest of the install, pipes, linesets, clean site, etc. Most importantly, who is going to take the picture? After you have decided the best way to make the point to the homeowner, assign the task to a champion and ask them to complete it for the next Company Profile Book meeting.

Keys to cover:

- Importance of Company Profile Book
- Chunk it down to manageable tasks
- Assign champion for tasks (photos, research, content)
- Confirm next Company Profile Book meeting.

Company Profile Book Checklist

Our Company - People

- ☐ Owner
- ☐ Office Manager
- ☐ Sales Coordinator
- ☐ Service Techs
- ☐ Install Teams

Our Company - Facility

- ☐ Fleet
- ☐ Training Room
- ☐ Dispatch Center
- ☐ Sheet Metal Shop
- ☐ Training certificates
- ☐ Other certifications
- ☐ Memberships (ACCA, etc.)
- ☐ Contracting Organizations
- ☐ Copy of Contractor's license
- ☐ Training Schedule (completed and future)
- ☐ Drug test certificate
- ☐ Background check documentation
- ☐ Insurance certificate
- ☐ Testimonials
- ☐ Letters from satisfied customers
- ☐ Permit application
- ☐ BBB report
- ☐ Registrar of Contractors info

Our installation

- ☐ Start to finish photos for common types of installations seen in your area
- ☐ Bad install photos "Dangers of a low bid"

Comfort System

- ☐ Manufacturer's info
- ☐ Third party research
- ☐ Local Utility Companies (high-SEER equipment)
- ☐ EPA info (IAQ products)
- ☐ Department of Energy info (high-SEER equipment)

Me

- ☐ Your picture
- ☐ Personal Certifications
- ☐ Completion certificates from training
- ☐ Testimonial letters

Step 9: Company Profile Book

(Monthly/weekly 60-90 minute face-to-face meeting)

Date: ______________________ Time: ____________

Dealer: ____ Dealer #: _______________

Contact: ____________________________ Phone Number: (   )____ - _______

Minutes	Material to be covered	Information Discussed
2-5	Confirm meeting for the following Monday	
10-15	Review monthly sales appointments	
5-10	Marketing ideas	
5-10	Schedule weekly/monthly coaching meetings	
5-10	Review Company Profile Book Checklist	
5-10	Review assigned tasks from last meeting	
5-10	Assign tasks/champoins for next meeting	
2-5	Wrap-up	

Objectives	Results
Progress on Company Profile Book	

Action Items	Champion
Send meeting ‘minutes’ to all attendees	
Schedule weekly/monthly coaching meetings	

Step 10: Ride-along with Comfort Consultant

Before your ride-along

- Review your notes from BOOT CAMP
- Review latest product information
- Review notes from last monthly meeting role-play
- Print copy of the One Minute Review©
- Make sure your dealer has at least 1 hour "debrief" time between sales appointments

Ride-along (90-180 minutes)

This is the biggest test of your relationship with your dealer. If you have been through the previous 9 steps together, you have taken the time to build a significant level of trust and rapport. At this point, you have established yourself as a business consultant/coach. Your dealer will be more open to having his business coach ride-along on a sales appointment.

Before you get to the appointment, make sure you have discussed what role you plan on playing. Will the dealer be introducing you as a trainee, the Trane factory rep, or someone else? Whatever your role will be, make sure you are ready to play the part.

When you get to the appointment, remember just two things. Be Quiet and Listen. Although you may feel like jumping in and helping your dealer with the sale, you are there to coach, not close the sale. As you and your dealer run through the call, review your copy of the One Minute Review© and make notes to bring up in your "debrief" meeting.

After you drive away from the appointment, pull over somewhere and review the appointment while it is still fresh in your mind. Be sure to ask questions before you offer opinions. You may want to try:

"How do you think it went?"
"Why do you think we did/didn't get the sale?"
"Do you see any opportunities for improvement?"

When reviewing your completed One Minute Review©, be sure to use the "sandwich method" by offering positive feedback before and after each opportunity for improvement. Your goal is to be invited back again, so make sure you give your dealer some relevant feedback that will improve their presentation. They need to leave this ride-along confident they can effectively use the process and that you will be there to help them perfect it. If you have time, role-play any "problem areas" with the presentation immediately.

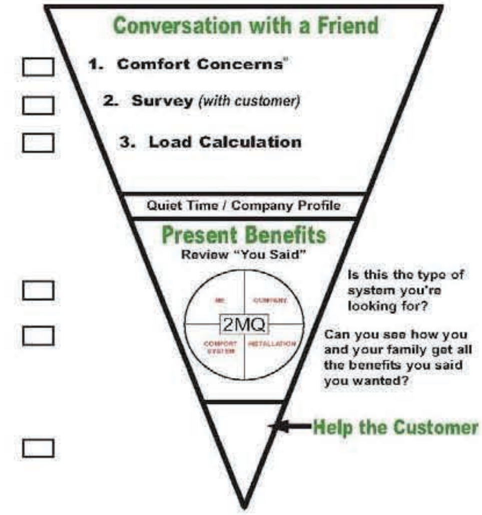
Be sure to suggest working on any opportunities for improvement during your next monthly review meeting in the office as well.

No Pressure Sales Call®
One-Minute Review

NAME ____________________ DATE ____________________ TIME ________ / ________
IN OUT

Customer Information	
Customer Name	____________________
Address	____________________
	____________________
	____________________
Phone	____________________

No Pressure Selling® Process



Rate how effectively you performed the following:

Comfort Concerns List

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Why? ____________________

No Pressure Selling Process

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Why? ____________________

LEFT LITERATURE	Clean Air Discussion	Sale
☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

NOTES: ____________________

Objection Handling

Objection(s) You Heard		***No Pressure Selling® Tool(s) You Used***			
☐ "The price is too high."	→	COMFORT CONCERNS LIST®	WHEEL OF VALUE®	ESTIMATED ENERGY SAVINGS®	other: ______
☐ "I need to get other bids."	→	COMFORT CONCERNS LIST®	WHEEL OF VALUE®	ESTIMATED ENERGY SAVINGS®	other: ______
☐ "I got a cheaper bid from______."	→	COMFORT CONCERNS LIST®	WHEEL OF VALUE®	ESTIMATED ENERGY SAVINGS®	other: ______
☐ "I can't afford it."	→	COMFORT CONCERNS LIST®	WHEEL OF VALUE®	ESTIMATED ENERGY SAVINGS®	other: ______
☐ other - "____________."	→	COMFORT CONCERNS LIST®	WHEEL OF VALUE®	ESTIMATED ENERGY SAVINGS®	other: ______

THE ACT GROUP INC.

Step 10: Ride-along with Comfort Consultant

(Quarterly/Monthly 2-3 hour face-to-face meeting)

Date: ______________________ Time: ____________

Dealer: ____ Dealer #: _______________

Contact: ____________________________ Phone Number: (___)_____ - _______

Minutes	Material to be covered	Information Discussed
2-5	Greetings	
5-10	Discussion about ride-alongs	
60-90	Sales appointment in-home	
15-60	Debrief using One Minute Review®	
5-10	No Pressure Selling® review or skills-practice	
2-5	Wrap-up	

Objectives	Results
Flush out any problems with dealer presentation	

Action Items	Champion
Confirm next monthly review	
Schedule next ride-along	

Changing the Perception of Role-Play

The value of role-play for building a comfort consultant's skill set is incredibly high. No one will argue that it is the most important activity when creating true sales professionals. Feedback from territory managers, comfort consultants, & business owners from all over the country reinforces this fact.

PROBLEM: Very few dealers ever actually role-play, and if they do, it is not done consistently.

Question: If role-play is so important, why doesn't everyone incorporate it into their regular sales meetings?

Answer: Fear.

Territory managers often say: "my dealers won't role play with me," and they don't know why. Business owners and comfort consultants say: "he'll kill me, or he'll tear me up". This perception of role-play is not conducive to sales skill development.

In sports, when a coach is working with an athlete to improve performance he is careful to focus on only one technical element during each practice session. The human brain deals most effectively with one thought at a time, so focusing on one aspect of the sales process when role-playing, while removing other portions will help comfort consultants develop. It works in sports and it works in our industry to improve sales performance through role-play. Why "throw the bucket" at the dealer during role-play? It only creates fear.

Goal: "Own the sales process". To achieve this goal, the perception of role-play needs to change NOW.

Question: How can this attitude be changed to get on with the business of "Owning the Sales Process?"

Answer: Kinder, gentler role-play.

The territory manager is the KEY to the dealer fully utilizing the No Pressure Selling® Process. They should schedule regular visits to include role-play sessions that will continue to build on what owners, managers, and comfort consultants learn at 4-day Trane BOOT CAMP.

See the following pages for detailed info on role-play sessions to use these concepts with your dealer's comfort consultants.

Session #1 – The Comfort Concerns List©

The first step to fully utilizing the No Pressure Selling® process is being comfortable introducing the concept of the Comfort Concerns© survey to our customer. Comfort consultants must ask the Comfort Concerns© questions and take good notes, getting the customer actively involved in the process. When the customer sees the interest the comfort consultant shows, (by taking notes on the Comfort Concerns© sheet) he/she begins to understand that the comfort consultant truly does have his or her best interest in mind.

The first role-play sessions with a dealer after attending 4-day Trane BOOT CAMP should emphasize this tool. This is where the comfort consultant is most likely to slip away from the process. When the Comfort Concerns© is skipped in its written form, comfort consultants lose the power to deal with the price objection.

During this session the territory manager should demonstrate the Comfort Concerns List© as well as play the customer. It is important to discuss any challenges with the comfort consultant as they arise when using the No Pressure Selling® Process. Keep in mind the time line of the sales presentation. The majority of the comfort consultant's time in the customer's home should be spent discussing the Comfort Concerns©, and establishing rapport during the in-home survey.

Session #2 – Handling Objections

In your first “objection” role-play with the dealer, the Territory Manager should take the role of the comfort consultant and let the dealer play the customer. After discussing the importance of the Comfort Concerns© using a completed form, begin the presentation in the middle, tying the product literature to the benefits “they said they wanted” and ask for the order. The Customer (dealer) should give the Territory Manager one objection, which they will deal with using the No Pressure Selling® Tools.

Next, it’s the dealers turn to be the comfort consultant. Be sure they are familiar with how the benefits offered by the comfort system address specific Comfort Concerns©. They must understand not to talk about features that do not supply benefits important to the customer. Have them start the role-play at the beginning of the “benefits presentation.” After the comfort consultant asks for the order – BUY!

This really works. It’s the first place the boat has been missed with role-play. If you always practice with the presentation not working and having to deal with a shotgun full of objections, how can you ever feel confident the process will work?

Then, practice dealing with an objection (not objections). Let the comfort consultant know that the next role-play will be practicing dealing with “Your price is too high”. First, discuss the transitional phrase that they will need to respond initially and get headed in the right direction (The price reflects …, etc.).

When the dealer offers the total investment & monthly investment, simply say “Boy, your price is too high” and he/she will deal with the objection using the Tools. It is okay if the dealer needs to have a “cheat sheet” at first. Remember, the goal here is to get comfortable with a system that works, not to pound him/her with every objection in the book. In the next session, work on the other common objection: “We need to get other bids.”

When the dealer discovers you are there as a coach, not to “beat them up,” they will look forward to your role-play session and be on the road to true skill development.

Everyone wins. Together, we can “own the sales process.”

Next step...

Selling is the engine that drives your business. Now is the time to improve your team's selling skills by calling 800-515-0034 to sign up for a FREE 30-minute NPS consultation or to register for our next session. Every program is motivational, uplifting and will help you get focused on the most important element in business right now... sales!

No Pressure Selling®

800-515-0034

www.NoPressureSelling.com

No Pressure Selling is a national sales training and business consulting firm based in Phoenix, AZ. Since 1986, they have shared their copyrighted No-Pressure Selling® Process with more than 10,000 participants. For more tips on improving your sales, please visit www.NoPressureSelling.com.