**Building Science Education Solution Center – Heat Pump Sales**

Proficiency Level 3: Apply

**Learning Objective 3.1:**

* Know how to build rapport with a customer

**Lecture Notes 3.1:**

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A typical sales presentation for an air source heat pump, a renewable energy system and/or efficiency package consists of the following steps:

A. Establish rapport with the customer (match their communication style). A key trait of a good salesperson is to establish rapport with the customer. Rapport implies that the salesperson would try to match the communication style of the customer. For example, an easy-going customer should be met with an equally easy-going salesperson. In contrast, if the customer is more interested on merely the technical details of the heat pump technology, then the salesperson should follow the customer’s style and focus on the heat pump’s technical specifications, energy performance, etc.

B. Describe your and your company's expertise and experience (the “credibility builder”). This is important for building trust in your information: Upgrading to an air source heat pump (ASHP) includes labor and associated capital cost investment. Therefore, the customer might feel nervous about the investment and the installation of a new system. In that case, the salesperson should be technically adept in ASHP technology and describe the principle of operation, the technical characteristics, and advantages of the ASHP products over the system that is already installed in the building. A good salesperson could mention his/her expertise in the field of ASHP and ensure the customer that the company has established experience with many successful installations over the past years. Bringing up examples of success stories and customers that were satisfied with their decision to switch to an ASHP could be a great way to ease the customer’s stress.

**Problem Set 3.1:**

1. True/False: A salesperson must remain consistent to his/her communication style, without taking into consideration the customer’s communication style.

2. True/False: Talking about the company’s expertise and experience regarding heat pump installations might be harmful for closing the sale.

**Learning Objective 3.2:**

* Know how to prepare a design questionnaire and perform a building walkthrough

**Lecture Notes 3.2:**

As a technical expert in ASHP, it is encouraged to have a ‘Design Questionnaire’ printed out to go over some questions with the building owner and assess whether the particular building is appropriate for an ASHP system or not. The design questionnaire will help the salesperson assess what specific heat pump product is appropriate for the particular building. Also, the sizing of the system is critical for the installation since a wrongly sized heat pump might lead to excessive or very short heat pump operation duration, which might lead to equipment wear and tear. Next, the installation location is important since unconditioned or conditioned spaces might affect the operation of the heat pump (i.e., coefficient of performance dur to the ambient temperature). Lastly, all the above information would be inputs to price the system and answer the question “how much will it cost?”

C. Fill out the Design Questionnaire. The purpose of the Design Questionnaire is threefold:

1. Find out whether their building is appropriate for such a system. Collect the technical information you need to assess the following:
   1. What system/products are appropriate
   2. Where you need to place it (e.g. crawl space, basement, furnace room, cold/hot rooms, collectors on the roof or the ground and where so there will be minimal shading if solar)
   3. Size of the system or energy efficiency products/services details (e.g. for air source heat pump - load sizing, duct sizing/assessment; for efficiency - insulation, air-sealing; for solar - number of collectors, size of storage, length between collector and storage to calculate wire or pipe size)
   4. Price of the system/product package.
2. Find out their actual and perceived need for the system/products: The salesperson needs to talk to the customer to understand their actual and perceived need of the system. For example, the customer might have read online resources regarding heat pump efficiency in different weather climates. The salesperson should be informed and answer to these questions with clarity and cite reputable sources, such as the US Department of Energy.
3. Build their understanding of the benefits and thereby build their motivation to purchase: Focus on the multiple benefits that the ASHP can deliver to the customer. Those would be reduced electricity costs, acceptable occupant thermal comfort levels, and avoided air pollution due to the lower overall electricity consumption.

D. Walk through the building to gather the rest of the information needed to design, place, size and price the system/products and help the building owner envision and feel more positive about what the system/products would consist of and look like on/in the building.

The assessment of the system very often requires that the salesperson performs a walkthrough of the building to gather information relevant to the air source heat pump installation. For example, there might be ductwork that is not usable for the new system or there might be needed installation upgrades that the owner is not aware of. The technician should be able to discuss with the building owner how the system will look and operate and what would be the benefits for the owner in terms of money saved, occupant thermal comfort, and/or avoided air pollution.

**Problem Set 3.2:**

3. As a technical expert in heat pump technology, you should have a ‘Design Questionnaire’ to go over with the customer. What is the purpose of the ‘Design Questionnaire?’

a. Assess if the building is appropriate for such a system, where to place the system, the size of the system, and an estimate of the total price.

b. Assess if the building is appropriate for such a system and an estimate of the total price.

c. Assess the size of the system and an estimate of the total price.

4. A walkthrough the building is encouraged because there might be building characteristics details, such as existing ductwork, that might be useful for a heat pump installation.

**Learning Objective 3.3:**

* Talk through the benefits of an ASHP and provide an economic analysis for the customer’s investment.

**Lecture Notes 3.3:**

E. Present the benefits and, if they want it, the economic analysis showing how this is a quality investment. (You might also calculate the amount of pollution avoided as well if the customer has such an interest.): Listing the benefits of an ASHP might not be enough for some building owners. As the rapport skill implies the technician should talk about the benefits based on what the owner cares about. For example, if the owner is focused on financials and how the system will save him/her money then the technician should present an economic analysis of their return of investment (ROI). Besides ROI, another metric of interest could be the amount of pollution avoided by switching to an ASHP.

**Problem Set 3.3:**

**5.** The installation of a heat pump has both economic and environmental benefits. A heat pump reduces the amount of energy use and therefore energy costs. Also, switching from gas-powered heating to electricity-powered systems will avoid air pollution from burning natural gas.

**Learning Objective 3.4:**

* Know how to close the deal

**Lecture Notes 3.4:**

F. Fill out the proposal and ask the customer to sign. Anticipate they will raise objections at this point. (It will often take 3 to 7 rounds of answering concerns and then asking the customer to sign the proposal again before the customer feels comfortable enough to purchase and sign the contract.

G. Write down all the objections. One possible close that works well is the following:

“What would keep you from going ahead with this?” Write down what they say.

“So if we can handle these concerns, you’d be willing to go ahead with it?” The technician should be able to take note of any objections/concerns that the owner might have in terms of the installation and operation of the ASHP. Also, engaging in a conversation with the owner to listen to his/her ideas regarding the described concerns might be helpful to brainstorm solutions together. Possible objections might include that reasons such as (a) the capital investment cost is very high, (b) worried about if the system will work in their climate, (c) worried about maintaining the system, (d) possible that how the system looks might interfere with aesthetics, and (e) simply think about it.

Keep repeating these two questions above, writing down all concerns, until the person says, “Yes” to the second question. Then repeat back the list so they know they have been heard.

(There is a given set of concerns that you will hear over and over again and will develop answers to.) Then address each concern, get their understanding and greater comfort on each one, and then say, “So does this address those concerns?” If they say no, keep addressing the concern. When they say, “Yes” to all concerns, then ask them to sign the proposal. They will probably have additional concerns so just go back to the two questions at the beginning of (G) and continue the process. Patience and having the ability to answer all their questions tend to build their trust and close the deal!

Remember the customer is never closer to signing the proposal than when you are there with them. Try to get a signature before you leave. If they need time to think about it, ask them to sign the proposal and give the deposit to hold the price and write on the contract that it can be canceled anytime until (whatever date they need to “think about it”). The goal is to be able to do one call closes, not two call closes. This will double the sales you create. Of course, the above is for home and small business installations; large installations typically take multiple meetings.

H. Follow up after the sale

Once you have made the sale, remember that you are still their support system for this decision, so be supportive. It is very important to follow up in the next day or two with a phone call. You can say to people, “Hi, \_\_\_\_\_\_\_\_ (fill in their name), how are you doing? Are you feeling excited or nervous or both?” Oftentimes people will say they are nervous (this is a large investment for many people). You can then say, “If you’re feeling nervous, you are normal. Many people feel that way. The excitement comes when the system/products are installed.” Such an interaction will allow them to acknowledge their nervousness in such a way that they will not be motivated to cancel the sale.

Open-ended exercises

Exercise 1. Go out and ask at least three people about putting a system in their home (e.g. solar, an air source heat pump, or installing a home performance/energy efficiency set of products.) Ask them if they know what resources are available near them to assist them in their decision. Also, what is stopping them from doing it? Create a list of the objections that they have to purchasing. Try to create an answer for each objection. We will discuss these answers and refine them as a group. Post your work so we can discuss.

Exercise 2. Role play closing the deal.

**Problem Set 3.4:**

6. Closing the heat pump installation deal might raise objections regarding which of the following?

a. Capital investment cost of the system.

b. Worries about the system working in the customer’s climate/location.

c. Maintenance cost of the system.

d. Aesthetics of the system.

e. All of the above.