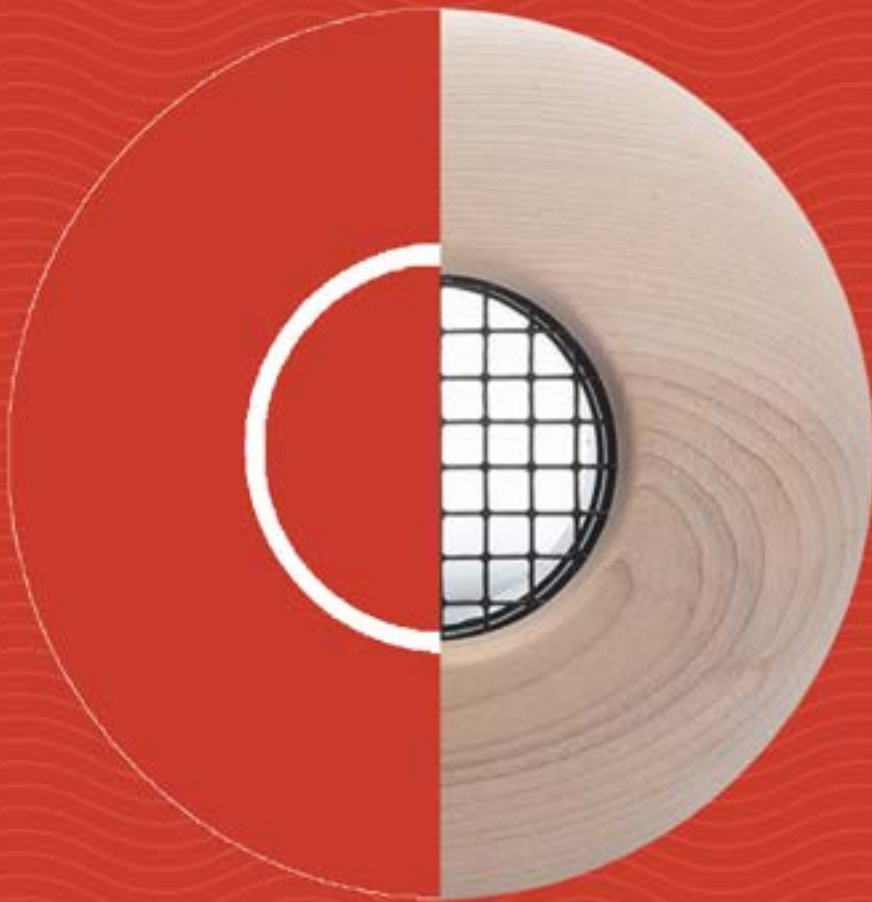


SALES PRESENTATION



Pre-Meeting

Preparation for the first meeting

Always

- ☐ It is always a good idea to send the homeowner at least three messages prior to the meeting:
 - ☐ The first message thanking them for setting the appointment and specifying the date and time of the meeting.
 - ☐ The second message should give them some background on you and your firm, and can include photos, videos, case studies, or referrals that would help the homeowner see your company in a positive light.
 - ☐ Finally, send a message the day before the appointment, re-confirming your meeting.
- ☐ Determine with whom you'll be meeting/speaking with and their preferred pronouns/method of address (Mr., Ms., Mrs., Dr., etc.) and, subtly, who is the decision maker.
- ☐ Ensure you have all necessary brochures/sales & marketing items, business cards, laptop/tablet/phone with camera and updated apps, paperwork, booties, and tools, etc. necessary to perform measurements or potential load calculations during the walk through without having to return to your vehicle.
- ☐ Make sure your person and dress are clean and presentable.

Never

- ☐ Eat/drink (unless offered by the homeowner), chew gum, smoke, vape, or use tobacco chew on the premises.
- ☐ Take any non-emergency calls during your meeting with the homeowner.
- ☐ Enter any area of the home without the owner's express permission
- ☐ Take pictures without the homeowner's notice and consent.

Arrival/Meeting

- ☐ Arrive 5 to 10 minutes early and wait in your vehicle until the appointed meeting time unless the homeowner invites you in early.
- ☐ Confirm the homeowner has adequate time for your sales presentation and ask permission to enter their home. Thank them for the opportunity to present to them.

Wear booties or shoe coverings before entering the home, unless the client says otherwise.

Advise the homeowner that you may need to walk through and take pictures of certain areas in the home and outside to determine areas for placement of equipment. Always obtain permission to enter any area of the home and/or take pictures.

- ☐ Ask the homeowner if you may start the initial visit before the walk through.

Initial Visit + Questionnaire

The Unico System Sales Presentation uses the A.L.L. (Ask, Listen, Learn) format to determine what the customer wants (which is of far more importance than what they need). Use the following questions, listen attentively, and note the customer's answers:

1. How many people live in the home?
2. Does anyone in the home have allergies?
How would you rate the overall quality of air in your home currently?
3. How long have you lived in this home?
How long do you plan on living here?
Do you plan on selling the home at any point in the near future?
4. Other than adding/upgrading the HVAC system(s), do you plan on making any other changes to the home?
If so, what are they?
5. Does your home currently heat satisfactorily?
If "no," in what specific areas are you looking for improvement?
6. Does your home currently cool satisfactorily?
If "no," in what specific areas are you looking for improvement?
7. What is your preferred/ideal temperature for hot months and cold months?
8. Show them the design temperatures and temperature criteria that will be used in determining the exact heating and cooling requirements for their home. Make sure that they are comfortable with the output temperatures that the design software will design to, and if not, make note and design to the temperatures they want.
9. What is your preferred/ideal humidity level for hot months and cold months?
10. Does the home have thermal windows? Is there insulation in the attic or side walls?
11. Does your home have adequate electrical service?
Any issues with outages or dimming lights when using any appliances?
12. Where would you most prefer any outdoor equipment to be located?
13. Have you ever purchased a central heating or cooling system before?
14. Have you received quotes from other HVAC installers? If so, why did you not choose to provide them the work?
15. This system should be installed to satisfy not only what you need, but what you want.
Is there any other information that would be helpful for us to know before we do our walk through?

Walk-Through

1. Ask permission of the homeowner to perform the walk through and have them accompany you to provide any answers to questions either of you may have.
2. Use a sizing form to determine what indoor equipment may be needed and begin your materials list/quote. Take pictures to determine equipment location. Always ask the homeowner's permission before taking any pictures.
3. Inspect the electrical box to determine if any changes/upgrades will be needed to provide power to a new Unico System(s).
4. Determine where the thermostat is located and if the homeowner wishes the replacement to remain in this location.
5. Determine where the homeowner would like the outdoor equipment to be located.
6. If possible and time allows, perform load calculations to determine the specific size of equipment needed. You will also need to request house plans, elevations, and U Values. However, since this can be time-intrusive and is not needed for an estimated quote, you may elect to perform load calculations once a quote is accepted and/or a contract is signed.

Sales Presentation

Go through the presentation materials you have, be they physical brochures/case studies/testimonials and/or videos on your laptop/tablet/phone, to demonstrate why the prospect should have confidence in The Unico System. Show pictures of The Unico System air handlers and describe their size and location within the home. Show pictures or provide samples of main ducting, supply tubing, and outlet styles.

Always let the homeowner know that you will be working up a full heating and cooling calculation for their home, so they can be assured to get all of the comfort they need and want.

The sales presentation is also a good time to mention that The Unico System may qualify for government incentives (if available by area). Unico publishes a list of these incentives on its website and they are also reachable through the UnicoSales App.

The presentation period is also an excellent opportunity for add-on sales for IAQ features such as UV HEPA filters, humidification, and zoning. Use the information you gleaned from the questionnaire to determine if any add-ons may satisfy the prospect's wants.

End of Meeting

It is always beneficial to discuss availability dates for the install. Some homeowners may want the work done right away, while they are away on holiday, or during a window when other work is also being done.

Provide the prospect with a digital and/or physical copy of their quote. Shake their hand and thank them for their time.

It is also important to have a follow up method for every sales call to a homeowner. This cadence should include:

1. A message the next day thanking them for their time.
2. If no response to the first message, send a second message three days later, including their quote and asking if they have any follow up questions.
3. Follow up a week after the second message, just checking in.
4. Communicate with them monthly until they move forward or let you know that they are no longer interested.





Good Luck + Good Selling!

For more information on The Unico System sales process,
visit www.unicosystem.com

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