



Turn to the experts

# THE NEW HANDSHAKE





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### With all of today's uncertainty,

it's proven difficult to plan work, let alone in-home service visits. So, how can you continue to deliver the personal experiences your customers have come to expect, no matter the circumstances?

The following are some best practices and ideas you can use during a sales call to gather information, as well as helping you tap into technology while keeping that personal touch. Included are additional questions you can ask homeowners to ensure their safety too.



## TECHNOLOGY

### Set Sales Calls with Video Meeting Apps

Video meeting or web conferencing applications are already in use with social activities like e-learning, music lessons, dance classes, and soccer practices. So take advantage of the technology available.

- Set up an account with a video meeting app like Zoom, Skype, Hangouts, GoToMeeting, or the platform of your preference
- Send the homeowner an email with the virtual meeting link and appointment time
- Use email contact to get better – send a survey (survey monkey evaluating sales call)



## THE HOMEOWNER

### Build Trust with Homeowners

To build trust with the homeowner, here are some things you can say:

“We protect our family and yours. We require anyone entering your home to:”

- Fill out a health questionnaire before entering
- Wear shoe covers, gloves and masks
- Ask a member of the household to open doors for us, as well as removing any items blocking the furnace or circuit breaker to minimize touch
- Not use your restroom or any other part of your house

### Understand Homeowner Issues

It is important to understand their issues. Ask them the following:

- What's the problem?
- When did it start?
- Will you show me the equipment?
- Will you show me the rating plate?
- Will you show me the control board?

### Understand the Home

Additional questions to ask about their home:

- Tell me your ideal comfort settings (temperature during day, night, work hours).
- How long do you plan to live in the house?
- How many floors are we conditioning?
- How many square feet?
- Do you live on a wooded lot?
- How many windows are in your house?
- How old are your windows?
- Does your attic have insulation?



## TEST & SUMMARIZE

### Test the Equipment

Tell the homeowner to go to the thermostat:

- Turn the temperature down to 60 degrees
  - What happens?
  - Feel the register, is it cold air?
- Turn temperature up to 80 degrees
  - What happens?
  - Feel the register, is it hot air?

### Summarize Findings and Options

Let them know what their options are. Here are some ideas:

- Be sure to offer a good, better, best solution
- Provide the features, functions and benefits of each system base on the homeowners input of concerns





## SELL ACCESSORIES – INDOOR AIR QUALITY

### **Easily Accessorize a Sale. Indoor Air Quality is a Perfect Example**

Indoor air quality is the quality of air inside the home. Temperature, humidity, air purity and freshness are all contributing factors, but there are things people usually don't think about until they turn into problems that can't be ignored.

### **Why Indoor Air Quality Matters**

People spend up to 90% of their time indoors breathing in air that is likely more polluted than the air outdoors. Poor air quality causes discomfort, health problems, and higher energy costs when your system runs inefficiently. Be sure to offer the array of indoor air quality products that can help your customers alleviate many of these problems.



### **Email a Proposal and Secure Your Sale**

Now that you've had the conversation, make a commitment and stick to it. If the homeowner doesn't commit during your in home call, let them know the following:

- I will email you a proposal right away
- Follow up within 12 hours of sending
  - Do you have any questions?
  - When can I schedule the install?
  - Any special instructions that would make you feel more comfortable with my installers?
- Consider using a virtual signature tool to get guarantee of your work



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