

Sales Process Training Outline

Articles and Tools



Step by Step for Advice in Training A New Sales Professional

Hiring the right person for a Comfort Advisor is critical. Likewise getting a new Comfort Advisor trained to productive sales people is just as critical.

This article ties to another one I wrote for this web site entitled 'Step-by-Step Advice in Hiring a Comfort Advisor.

I prefer to hire people already possess good in-home sales skills as demonstrated in their work history. I find it much easier to teach someone the technical skills required of the job rather than take someone who has the technical knowledge and to try to train them on the selling skills required for in-home sales. In-home sales require very special selling skills to be successful.

Consequently, the people I hire for the position tend to have very little knowledge of the HVAC industry. It's my challenge to provide them with the technical knowledge that they will need to perform the job. At the same time, they need training on the in-home sales process my company endorses and on completing the necessary paperwork on a sales call and the additional paperwork required on a sale. They also need training on our company sales policies and procedures.

The first step in putting together a successful training program is to define the training objectives by identifying what knowledge must be acquired in the training process. The second step is to layout a training plan that identifies the training topic and the roles of the trainer and student for each day of the training period. The final step is to measure the student's understanding and ability to execute those items covered in the training objectives.

This article shares the Comfort Advisor training plan I use at my company. It may be helpful to know how the company is structured. We are totally residential service and replacement. We have maintenance technicians that specialize in performing precision tune-ups. We have service technicians. We also have a position entitled a Senior Technician who is trained to sell as well as do both service and maintenance. We have Comfort Advisors and installation crews. I have a right hand person who heads up the operation side and we are both involved in sales management.

Training Period

When we hire a new Comfort Advisor, we put them through a 3-week training period. During that time they are paid a salary to help tie them over until they are ready to start sales calls. At that time, they go to straight commission. Incidentally we do not do sales draws. I do not believe in them.

During the 3-week training period, the new person will spend most of the time riding along with others to learn from the people who do the actual work. Our company is built on a culture of teamwork and everyone helps the team so we can all be successful.

Each day is outlined as to who the trainee is going to be with and what they are to learn. We have checkpoints along the way to make sure the person grasps what was taught and is engaged in the training process. For example, the trainee has to perform load calculations and has to do various presentations to demonstrate their ability to utilize the skills that were taught in training.

In-Home Sales Process Recap

We've developed an in-home sales process that's been very successful for us over the years. It's very similar to the sales process described on this website. Here is a recap of the basic elements in this sales process:

- Customer Greeting – Warm up
- Customer Assessment
- Technical Assessment
- Sales Presentation using a presentation manual
- Close

Although our new Comfort Advisors already have in-home sales experience, we mandate they use our sales process. One of the training objectives is to train the new person our sales process. Their sales calls must adhere to our sales process.

As with any process, it will breakdown over time, unless it is constantly reinforced. We have weekly sales meetings. As one of the agenda items at each meeting, we spend time reviewing elements of the sales process. In addition, if the Comfort Advisor's closing rate drops below a set level, he/she goes back into training to reinforce the sales process.

Training Debriefing Form

It can be a trying time for a new employee when they are in training. There's much to learn and it can get discouraging at times. You want the people to feel good about what they are learning and about their decision to be a Comfort Advisor. We use a simple device called a Positive Focus Form to help in this.

The form is good for two days. Each day the trainee completes the form and identifies what was accomplished that day, why it was important, the future progress and what next action they intend to take on this. The trainee reviews his/her progress with the Sales Manager or myself.

The trainee feels good about what he/she is learning and becomes actively involved in the training process. A sample of the form we use is shown on the next page.

Know Thy Competition

To be effective at sales, I believe it's important for sales people to know as much as they can about the competition. We dedicate a couple of days towards this in the training plan.

The trainee will be asked to collect 5 estimates for their home. We designate which companies they're to get the estimates from. We also ask that they request quotes for both high-end equipment as well as middle of the road.

We then ask the trainee to fill out 2 forms for each company. One comments on what they encountered over the phone when setting up the sales appointment. The other covers the sales presentation itself.

Training Debriefing Form

Date:

	Accomplishments	Why Important	Future Progress	Next Action to take on this
1				
2				
3				
4				
5				

The trainee prepares a presentation for an upcoming sales meeting. I give the trainee information on how to set the presentation up and he/she uses the documents that were completed on the companies that visited their home. The trainee gives the presentation at the sales meeting and the other Comfort Advisors are updated on the competition.

Comfort Advisor Training Plan

This is the Comfort Advisor training plan that we use at my company. Your company may be structured differently. Formulate your own training plan based on your training needs.

Day 1(Monday)

Training Objectives

- Meet fellow team mates.
- Be exposed to company culture and gain understanding of how things work by attending various department meetings.
- Learn basic operation of air conditioning.
- Learn basic operation of furnace.
- Learn proper procedures for a tune-up and safety inspection.
- Learn the benefits of a service agreement and why every customer needs one.
- Learn about maintenance paperwork and flat-rate pricing guide.
- Learn the company customer communication procedures.

Dress Attire & Agenda

- Business casual with uniform shirt.
- Arrive at company.
- Attend 7:00am Company Meeting.
- Attend 7:45am Service Training Meeting.
- Attend 8:30am Sales Meeting.
- Ride with Maintenance Technician for the rest of the day.

Role of Trainer

Select a Maintenance Technician with excellent communication skills.

- Review the operation of the air conditioner and explain how it works.
- Review the operation of the furnace and explain how it works.
- Review the proper procedures for a tune-up and safety inspection.
- Review the maintenance paperwork used in the home, introduce the flat-rate pricing guide and explain service agreement program.
- Expose the trainee to customer communication procedures.

Special Instructions to Trainee

- Introduce yourself to homeowners as a trainee.
- Keep conversations with the homeowner to a minimum and only on subjects unrelated to maintenance.
- Ask Senior Technicians questions freely to achieve training objectives.
- Complete Positive Focus Form at the end of the day.

Day 2

Training Objectives

- Learn the basic configuration of a heating and air conditioning system (Up-flow, Down-flow & Horizontal).
- Learn all the basic components in a system including the flue, electrical disconnect, line set, plenum and ducting.
- Learn how the sales process differs between a Senior Technician and a Comfort Advisor.
- Learn what guarantees and warranties the company offers.
- Learn how to use the energy analysis and true cost of ownership forms.
- Learn various aspects of the sales process and sales procedures including:
 - How a technician lead is set.
 - The desire for all decision makers be present.
 - The 60 – 90 minutes time requirements for a sales call.
- Learn communication that's needed with the technician after running a technician set lead.

Dress Attire & Agenda

- Business casual with uniform shirt.
- Attend 7:00am technician communication meeting.
- Ride with a Senior Technician for the rest of the day.

Role of Trainer

- While on maintenance and service calls:
 - Explain the basic configuration of a heating and air conditioning system (Up-flow, Down-flow & Horizontal)
 - Explain all the basic components in a system including the flue, electrical disconnect, line set, plenum and ducting.
 - Explain how the sales process differs between a Senior Technician and a Comfort Advisor.
 - Explain all the guarantees and warranties the company offers.
 - Explain how to use the energy analysis and true cost of ownership forms.

- Explain the various aspects of the sales process and sales procedures including:
 - How a technician lead is set.
 - The desire for all decision makers be present.
 - The 60 – 90 minutes time requirements for a sales call.
 - Explain communication needs with the technician after running a technician set lead.
 - Give your insights to the role of the Senior Technician and answer all trainee questions.

Special Instructions to Trainee

- Introduce yourself to homeowners as a trainee.
- Keep conversations with the homeowner to a minimum and only on subjects unrelated to maintenance or service.
- Ask Senior Technicians questions freely to achieve training objectives.
- Complete Positive Focus Form at the end of the day.

Day 3

Training Objectives

- Learn about job staging in the warehouse, installation paperwork and how the forms are utilized.
- Learn all phases of the installation and requirements (i.e. – flue venting, running line sets, condensate removal, electrical hook-up, etc.
- Review installation paperwork and compare to the actual home.
- Understand how the installer relies on the information that a Comfort Advisor puts together on a sold job.
- Observe how paperwork is handled with the homeowner after the job is completed. Note that we are a COD company and that when closing the job we must make sure the customer is aware that payment is due at the time of completion.

Dress Attire & Agenda

- Business casual with uniform shirt.
- Arrive at 7:00am and meet installation crew leader 'A' and his assistant.
- Be prepared to spend the full day with the installation crew.

Role of Trainer

When picking up the job and performing the installation:

- Introduce trainee to warehouse personnel.
- Explain how the job is staged in the warehouse per the information provided by Comfort Advisor in the sales paperwork.

- Review all phases of the installation including tear out, running the line set, flue venting, condensate removal, electrical hookup etc. and explain what the Comfort Advisor needs to look for.
- Review basic code requirements and explain what the Comfort Advisor needs to look for.
- Explain how you rely on the installation paperwork filled out by the Comfort Advisor to install the job.
- After completing the job and presenting the paperwork to the customer answer any questions the trainee may have.

Special Instructions to Trainee

- Follow the installation crew to the job in your personal vehicle. The installation trucks are only set up for 2 passengers.
- Keep conversations with the homeowner to a minimum and only on subjects unrelated to the installation.
- Ask crew leader questions freely to achieve training objectives.
- Complete Positive Focus Form at the end of the day.

Day 4

Training Objectives

- Learn about job staging in the warehouse, installation paperwork and how the forms are utilized.
- Learn all phases of the installation and requirements (i.e. – flue venting, running line sets, condensate removal, electrical hook-up, etc.
- Review installation paperwork and compare to the actual home.
- Understand how the installer relies on the information that a Comfort Advisor puts together on a sold job.
- Observe how paperwork is handled with the homeowner after the job is completed. Note that we are a COD company and that when closing the job we must make sure the customer is aware that payment is due at the time of completion.

Dress Attire & Agenda

- Business casual with uniform shirt.
- Arrive at 7:00am and meet installation crew leader 'B' and his assistant.
- Be prepared to spend the full day with the installation crew.

Role of Trainer

When picking up the job and performing the installation:

- Explain how the job is staged in the warehouse per the information provided by Comfort Advisor in the sales paperwork.
- Review all phases of the installation including tear out, running the line set, flue venting, condensate removal, electrical hookup etc. and explain what the Comfort Advisor needs to look for.

- Review basic code requirements and explain what the Comfort Advisor needs to look for.
- Explain how you rely on the installation paperwork filled out by the Comfort Advisor to install the job.
- After completing the job and presenting the paperwork to the customer answer any questions the trainee may have.

Special Instructions to Trainee

- Follow the installation crew to the job in your personal vehicle. The installation trucks are only set up for 2 passengers.
- Keep conversations with the homeowner to a minimum and only on subjects unrelated to the installation
- Ask crew leader questions freely to achieve training objectives.
- Complete Positive Focus Form at the end of the day.

Day 5

Training Objectives

- Learn about job staging in the warehouse, installation paperwork and how the forms are utilized.
- Learn all phases of the installation and requirements (i.e. – flue venting, running line sets, condensate removal, electrical hook-up, etc.
- Review installation paperwork and compare to the actual home.
- Understand how the installer relies on the information that a Comfort Advisor puts together on a sold job.
- Observe how paperwork is handled with the homeowner after the job is completed. Note that we are a COD company and that when closing the job we must make sure the customer is aware that payment is due at the time of completion.

Dress Attire & Agenda

- Business casual with uniform shirt.
- Arrive at 7:00am and meet installation crew leader 'A' and his assistant.
- Be prepared to spend the full day with the installation crew.

Role of Trainer

When picking up the job and performing the installation:

- Explain how the job is staged in the warehouse per the information provided by Comfort Advisor in the sales paperwork.
- Review all phases of the installation including tear out, running the line set, flue venting, condensate removal, electrical hookup etc. and explain what the Comfort Advisor needs to look for.
- Review basic code requirements and explain what the Comfort Advisor needs to look for.
- Explain how you rely on the installation paperwork filled out by the Comfort Advisor to install the job.

- After completing the job and presenting the paperwork to the customer answer any questions the trainee may have.

Special Instructions to Trainee

- Follow the installation crew to the job in your personal vehicle. The installation trucks are only set up for 2 passengers.
- Keep conversations with the homeowner to a minimum and only on subjects unrelated to the installation.
- Ask crew leader questions freely to achieve training objectives.
- Complete Positive Focus Form at the end of the day.

Day 6 (Monday)

Training Objectives

- Learn the 'Warm Up' segment of the sales process.
- Learn how to measure a home.
- Learn how to do load calculations.
- Learn how to do electrical calculations.

Dress Attire & Agenda

- Business casual.
- Arrive at company at 6:45am.
- Attend 7:00am Company Meeting.
- Attend 7:45am Service Training Meeting.
- Attend 8:30am Sales Meeting.
- Spend the day with Sales Manager.

Role of Trainer

- Review the 'Warm Up' part of the sales process at the sales meeting.
- Answer any questions the trainee has on the 'Warm Up'.
- Review the technical aspects of a Comfort Advisors role
- Train how to measure a home.
- Train how to do a load calculation.
- Train how to do an electrical calculation.
- Review the operation of the training equipment in the training room.

Special Instructions to Trainee

- You will be required to do load calculations on your home and on a neighbor's home. These calculations are due to the Sales Manager by 11:00am the next day.
- Complete Positive Focus Form at the end of the day.

Day 7

Training Objectives

- Learn the 'Customer Assessment' portion of the sales presentation.
- Learn how to use the confidential questionnaire.
- Learn the follow up questions to the questionnaire.
- Dress Attire & Agenda

Business casual

- Be in the office by 11:00am to meet with the Sales Manager.
- Review assignment with Sales Manager.
- After lunch meet with Sales Manager the rest of the day

Role of Trainer

- Review the load calculation and electrical calculations with trainee.
- Answer any questions the trainee has about these calculations.
- Review the 'Customer Assessment' portion of the sales presentation.
- Train how to use confidential questionnaire.
- Train how to ask follow up questions to questionnaire.

Special Instructions to Trainee

- Do the load calculations and electrical calculations for your home and a neighbor's home.
- Complete Positive Focus Form at the end of the day.

Day 8

Training Objectives

Most of this day concentrates on administration of sales leads.

- Learn how appointments are set.
- Learn how you will be dispatched your sales leads.
- Learn how to close out your call.
- Learn how to check on your lead status.

- Learn when a lead counts towards your closing ratio.
- Learn when a sale gets posted on sales board.
- Learn what a complete Job Folder looks like.
- Learn all the functions of lead coordination & the Comfort Advisor dispatch and your responsibilities in that process.
- Learn how installation scheduling works.
- Learn the process the Installation Coordinator goes through when getting financing paperwork processed.
- Learn how warranty and equipment information gets entered into the computer.
- Learn the rest of the sales process.

Dress Attire & Agenda

- Business casual.
- Be in the office by 8:00am to meet with Lead Coordinator and Installation Coordinator.
- Meet with owner at approximately 3:00pm.

Role of Trainer

- The Lead Coordinator and Installation Coordinator will review all of the bullet points in the training objective.
- Answer any questions the trainee may have.
- Make sure the trainee understands these administrative procedures.
- The owner will review the sales presentation and explain how it works.

Special Instructions to Trainee

- Complete Positive Focus Form at the end of the day.

Days 9 & 10

Training Objectives

- Collect 5 estimates from the competition (as identified by owner).
- Learn how the competition sales.

Special Instructions to Trainee

- Get quotes on both high-end equipment as well as middle of the road. It's most important for them to leave you good solid prices and for you to see the presentation they give.
- You will also fill out two documents for each estimate. The first is the Customer Service Representative phone process form. The second is the Comfort Advisor In-Home process form. Fill these forms out in detail.

- You will give a presentation on Know Thy Competition at the next sales meeting, which will be held on day 12. The owner will give you details on how to prepare for the presentation.
- Complete Positive Focus Form at the end of the day.

Day 11 (Saturday)

Training Objectives

- Learn the entire sales call process.
- Learn insights into being a Comfort Advisor.
- Learn from the assigned questions in the Special Instructions.

Dress Attire & Agenda

- Business casual.
- Spend the day Comfort Advisor. Arrange with Lead Coordinator at what time to meet Comfort Advisor.

Role of Trainer

- Share the company's sales strategies with the trainee.
- Let the trainee watch you perform the sales process.
- Discuss the topics within the assigned questions in the Special Instructions.

Special Instructions to Trainee

- Meet with the Comfort Advisor at the company and leave together in one vehicle.
- While riding share discuss the company's sales strategies.
- While in a customer's home, it is very important to remember that this is a real sales appointment. Introduce yourself as someone who is learning and leave it at that. Keep your conversation to a minimum with the customer. Suggest topics like the weather, sports or their home. Let the Comfort Advisor do the presentation. If the Comfort Advisor invites you into the conversation, follow his/her lead. Be careful not to interfere with the sales process. Save your questions until after the call is completed.
- After you leave the house, be prepared to discuss the following topics with Comfort Advisor:
 1. How did the approach to the front door go?
 2. What is the importance of the floor savers and how did the customer react to them?
 3. How long was the warm-up and where was it done?
 4. How was the measure-up sheet used?
 5. How did the load calculations work out?
 6. Observe the presentation. At what point did it begin? Was the customer involved? Were all the pages in the sales presentation book used? If not, why?
 7. How was the investment presented?

8. How was financing presented?
9. How did the scheduling of the job go?
10. How did the closeout go?

If time permits, get a cup of coffee or refreshment. This is a great time to share how the lead went. Ask questions on all that you saw and be clear on all aspects of the sales call and what was accomplished.

- Complete Positive Focus Form at the end of the day.

Day 12 (Monday)

Training Objectives

- Give the Know Thy Competition presentation at the sales meeting.
- Learn the paperwork requirements of the job.
- Learn how to use the financing forms.
- Learn how to assemble sales packets.
- Learn the 'Laying out Options & Closing' portion of sales presentation.

Dress Attire & Agenda

- Business casual.
- Arrive at company at 6:45am.
- Attend 7:00am Company Meeting.
- Attend 7:45am Service Training Meeting.
- Attend 8:30am Sales Meeting.
- Spend the rest of the day with Sales Manager.

Role of Trainer

- Provide feedback to the Know Thy Competition presentation.
- Review the 'Laying out Options & Closing' portion of sales presentation.
- Review the paperwork requirements.
- Review how to use financing forms.
- Review how to assemble sales packages.

Special Instructions to Trainee

- Present the Know Thy Competition to the sales team. Use the document you filled out when getting estimates.
- After the sales meeting you will spend the rest of the day with the Sales Manager. You will be introduced to all of the paperwork requirements.

- You will review financing.
- You will begin loading your sales packets.
- You will review the 'Laying out Options and Closing' portion of the sales presentation. You will get help from a Comfort Advisor, the Sales Manager and the owner.
- Complete Positive Focus Form at the end of the day.

Days 13

Training Objectives

- Learn the entire sales call process.
- Learn insights into being a Comfort Advisor.
- Learn from the assigned questions in the Special Instructions.

Dress Attire & Agenda

- Business casual.
- Spend the day Comfort Advisor. Arrange with Lead Coordinator at what time to meet Comfort Advisor.

Role of Trainer

- Share the company's sales strategies with the trainee.
- Let the trainee watch you perform the sales process.
- Discuss the topics within the assigned questions in the Special Instructions.

Special Instructions to Trainee

- Meet with the Comfort Advisor at the company and leave together in one vehicle.
- While riding share discuss the company's sales strategies.
- While in a customer's home, it is very important to remember that this is a real sales appointment. Introduce yourself as someone who is learning and leave it at that. Keep your conversation to a minimum with the customer. Suggest topics like the weather, sports or their home. Let the Comfort Advisor do the presentation. If the Comfort Advisor invites you into the conversation, follow his/her lead. Be careful not to interfere with the sales process. Save your questions until after the call is completed.
- After you leave the house, be prepared to discuss the following topics with Comfort Advisor:
 1. How did the approach to the front door go?
 2. What is the importance of the floor savers and how did the customer react to them?
 3. How long was the warm-up and where was it done?
 4. How was the measure-up sheet used?
 5. How did the load calculations work out?

6. Observe the presentation. At what point did it begin? Was the customer involved? Were all the pages in the sales presentation book used? If not, why?
7. How was the investment presented?
8. How was financing presented?
9. How did the scheduling of the job go?
10. How did the closeout go?

If time permits, get a cup of coffee or refreshment. This is a great time to share how the lead went. Ask questions on all that you saw and be clear on all aspects of the sales call and what was accomplished.

- Complete Positive Focus Form at the end of the day

Day 14

Training Objectives

- Learn how the warehouse works.

Dress Attire & Agenda

- Business casual.
- Arrive at 7:30am.
- Spend first part of morning meeting with warehouse personnel.
- Around 10:00am give sales presentation to Sales Manager and owner.
- Spend the rest of the afternoon and evening running sales appointments with Comfort Advisor.

Role of Trainer

- Review how the warehouse works: ordering, paperwork, etc.
- Provide feedback and advice on the sales presentation the trainee gives.

Special Instructions to Trainee

- Meet with warehouse personnel first thing in the morning.
- Prepare sales packets for your first 30 sales appointments.
- Give a sales presentation to the Sales Manager and owner. They will spend the rest of the morning giving advice to help in your preparation. They will prepare a checklist of all the items you need to have a grasp on at this meeting.

Days 15 & 16

The trainee runs leads with the Sales Manager for the next two days and then they are on their own.

Why is this critical to your success?

- Allows you to create an effective training plan for new Comfort Advisors.
- Allows you to set specific training objectives for both the trainer and the trainee.
- Allows a new Comfort Advisor to learn the technical aspects of the job from the people who do the actual work.
- Allows a new Comfort Advisor to learn your company's sales processes and procedures from fellow Comfort Advisors.
- Allows you to continue building teamwork among all employees.
- Allows a new Comfort Advisor to quickly get acquainted with the HVAC residential replacement industry.
- Allows you to grow your business. A productive Comfort Advisor can generate \$1 million in revenue each year.