BLUE COLLAR BLUEPRINT

CHOOSE2 SALES TRAINING PLAYBOOK

HVAC SALES PROFESSIONALS



Build Trust. Present Options. Close with Confidence.

CHOOSE^{2}™

THE Residential Replacement Process

Building Trust Through Character,…

Delivering Results Through Options.

From Service Call to Install Scheduled

We Guide the Decision

We Don't Push the Sale

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CHOOSE2 and Elite Sales Closers

Choose your starting point

CHOOSE2™ is the foundational residential HVAC replacement sales playbook for newer salespeople. Learn a repeatable seven-stage consultation, educate homeowners about replacement equipment, and guide informed decisions with confidence.

The Elite Sales Closers with CHOOSE PLUS™ Playbook builds on that foundation. It develops advanced consultation and closing skills through four phases, fourteen integrated skills lessons, ten reusable tools, assessments, and ongoing coaching.

How the two playbooks differ

Compare	CHOOSE2	Elite Sales Closers — CHOOSE PLUS
Best fit	Newer salespeople or advisors strengthening the fundamentals.	Advisors ready to deepen skills, resolve performance gaps, and build consistency.
Main focus	Foundational sales strategy and effective customer education about HVAC replacement.	Advanced discovery, solution design, presentations, concerns, decision leadership, and follow-through.
Practice	Seven stage-based lessons with scripts, exercises, and field application.	Four phases, fourteen skills lessons, ten tools, roleplays, assessments, and coaching.
Objective	Execute the complete consultation and help the homeowner understand suitable choices.	Develop close rates above 50%, work toward results as high as 80%, and sustain strong performance. Development goals, not guaranteed outcomes.

One framework with a clear next step

Both playbooks use C–H–O–O–S–E–E. H is Hospitality and House Rules in both. Hello and Set the Frame is an advanced H-stage skill in CHOOSE PLUS, not a different stage. PLUS means Performance, Leadership, Understanding, and Sustainability: disciplines applied across the shared process.

Start with CHOOSE2 when you need the foundation. Progress to Elite Sales Closers — CHOOSE PLUS when you can execute the seven stages and want deeper practice, stronger closing performance, and a repeatable coaching system. Prior CHOOSE2 experience is helpful, rather than a formal prerequisite. Use your supervisor’s observations and work samples to identify the next skill to develop.

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CHOOSE^{2} ™
THE Residential
Replacement Process

We Guide a Customer's Decision

We Don't Push the Sale

C – Connect Before You Arrive (Pre-Arrival Call)

Prepare the Customer for a Great Experience

Customer Thought: "This company is professional."

H – Hospitality and House Rules (Trust + Tone)

Arrival and Setting the Frame

Customer Thought: "I trust this person."

O – Open Discovery (THIS DRIVES EVERYTHING) (Emotional + Practical)

Understand Their Situation Before Offering Solutions

Customer Thought: "They understand my needs."

O – Observe & Inspect (Build Evidence for the Customer's Benefit)

Gather Facts and Build Evidence

Customer Thought: "They're being thorough."

S – Share the Science (Share your Knowledge)

Education Without Selling

Customer Thought: "Now I understand,"

E – Explore Solutions & Equipment Choices

Guide the Homeowner Through Their Options

Customer Thought: "I have options."

E – Empower the Decision

Price Presentation, Objection Resolution, Closing, Scheduling & Reinforcement

Customer Thought: "This was my decision."

Our job is not to convince homeowners. Our job is to educate them so they can confidently CHOOSE the best solution for their family.

CHOOSE²™ Selling System

Lesson 1 Connect before you arrive

Purpose and customer experience

The consultation begins before the door opens. A useful pre-arrival call reduces uncertainty about who is coming, when they will arrive, and what the visit involves. Your aim is to earn permission for a productive conversation, not to qualify the homeowner by how quickly they will buy. Use the role your company assigns and describe your work accurately; a sales title does not establish technical credentials.

How to apply the lesson

Review the appointment record, service history, stated concern, and any promises already made. Confirm the arrival window and ask whether the homeowner has a time constraint, access requirement, or specific concern. Explain that you will listen, review available information, and discuss suitable next steps. Ask whom the homeowner would like involved without making another person's attendance a condition of receiving help.

Model conversation

"Hi, this is [Name], your comfort advisor with [Company]. I expect to arrive between [times]. I understand you want help with [recorded concern]. We will discuss what you want to improve, review the system information, and look at suitable options. What should I know before I arrive, and how much time have you set aside?" If delayed, give a realistic revised window and offer a choice to continue or reschedule.

Practice and coaching

Pair up for a three-minute call. The homeowner is working from home and has only 45 minutes. The advisor must acknowledge the limit, explain what can reasonably be completed, and document any follow-up needed. The coach checks for an accurate introduction, confirmed timing, one open question, and a clear agreement. Repeat the call after feedback.

Required record and transition

Record the concern in the customer's words, confirmed timing, access instructions, and any outstanding question. Carry those notes into the arrival conversation so the customer does not need to start again. Readiness means the appointment expectations are clear, not that a sale has been promised.

Prepare the Customer for a Great Experience

Objectives

- Confirm appointment
- Reduce anxiety
- Build trust before arrival

Activities

✓ Pre-arrival phone call
✓ Confirm arrival time
✓ Introduce yourself
✓ Set expectations
✓ Ask if there are specific concerns

Use your company-assigned role and accurately describe your training and responsibilities.

Goal: Set expectation that this is a custom comfort consultation

Script: “Hi, this is [Name] with [Company]. I will be your comfort advisor. Is this still a good time for our visit, and what would you most like us to address?”