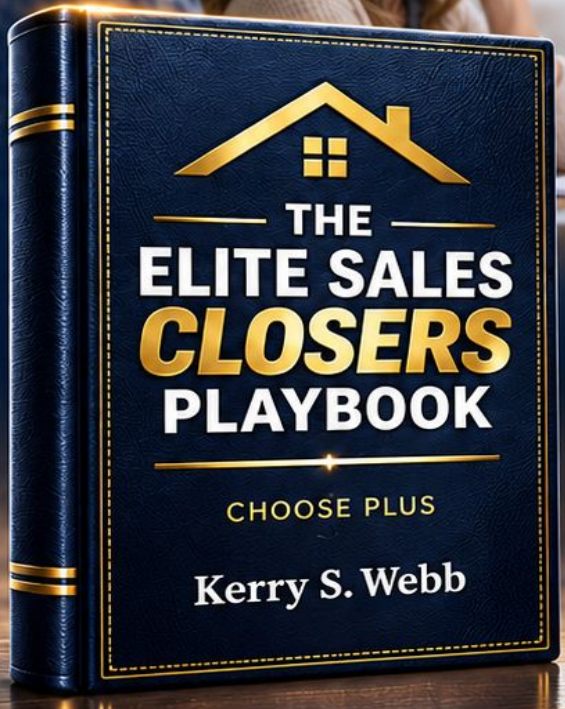
BLUE COLLAR BLUEPRINT

THE ELITE SALES CLOSERS PLAYBOOK

RESIDENTIAL HVAC SALES TRAINING



4 TRAINING PHASES

10 REUSABLE TOOLS

Build Trust. Present Options. Close with Confidence.

The Elite Sales Closers Playbook

CHOOSE PLUS

Blue Collar Edition

Kerry S. Webb

Residential HVAC Sales Training Guide

Enhanced Training Edition

Instructor and Participant Manual

A complete learning path from preparation and discovery to solution design, customer decisions, installation handoff, and field mastery.

System Design • Customer Trust • Multiple Options • Confident Decisions

PHASE 1 - Foundations and the CHOOSE PLUS Process

PHASE 2 - Discovery Education and Solution Design

PHASE 3 - Presenting Options and Guiding Decisions

PHASE 4 - Delivering the Promise and Building Mastery

Includes four training phases, fourteen integrated CHOOSE PLUS skills lessons, ten reusable appendix tools, and practice and final assessments with instructor guidance.

Participant _____

Instructor _____

Training dates _____

Training synthesis with original exercises and scripts.

Table of Contents

PHASE 1 FOUNDATIONS AND THE CHOOSE PLUS PROCESS

Phase Overview and Learning Plan....9
The Comfort Designer Role....10
Mindset and Appointment Preparation....11
Skills 01 Prepare a Visit That Starts With Trust....12
Skills 02 Reset Expectations When Plans Change....14
Trust Through Observable Behavior....16
Listening That Changes the Recommendation....17
Discover Priorities and Decision Conditions....18
Adapt Communication Without Stereotyping....19
The CHOOSE PLUS Conversation Map....20
Connect and Establish the Visit....21
Skills 03 Earn Permission at the Door....22
Skills 04 Agree the Agenda and Decision Conditions....24
Open Discovery and Record What Matters....26
Observe Evidence and Explain Its Meaning....27
Explore Options and Empower the Decision....28
Integrated Roleplay and Coaching....29
Phase 1 Knowledge and Application Assessment....31
Answer Key and Field Transfer....32

CHOOSE PLUS Skills Practice lessons are integrated after their related core lessons. Each includes teaching, practice, and coaching.

Table of Contents Continued

PHASE 2 DISCOVERY EDUCATION AND SOLUTION DESIGN

Phase Overview and Learning Plan....33
Discover the Whole Customer Situation....34
Rank Preferences and Define Success....35
Skills 05 Discover the Experience Behind the Complaint....36
Skills 06 Rank Priorities and Define a Useful Outcome....38
Map the Home and Its Use....40
Build an Evidence Record....41
Hand Off the Right Technical Questions....42
Skills 07 Build an Evidence Record You Can Defend....43
Skills 08 Turn Findings into a Technical Review Request....45
Explain Airflow as Part of the System....47
Explain Sizing and Installation Quality....48
Teach Equipment Differences Clearly....49
Use Visuals and an Education Book....50
Explain Benefits Without Inventing Results....51
Skills 09 Explain the System in the Customer's Language....52
Skills 10 Translate Features Without Inventing Benefits....54
Turn Findings Into a Written Scope....56
Work the Rivera Design Case....57
Phase 2 Roleplay and Design Review....58
Phase 2 Knowledge and Application Assessment....59
Answer Key References and Field Practice....61

Table of Contents Continued

PHASE 3 PRESENTING OPTIONS AND GUIDING DECISIONS

Phase Overview and Learning Plan....62
Confirm Readiness Before Presenting....63
Build a Comparison the Customer Can Use....64
Skills 11 Build Suitable Options with a Common Scope....65
Deliver a Clear Options Presentation....67
State the Total Investment Clearly....68
Explain Financing as an Optional Payment Choice....69
Practice Payment and Promotional Comparisons....70
Clarify the Concern Before Responding....71
Respond to Price and Value Concerns....72
Compare Competing Proposals Fairly....73
Skills 12 Present Tradeoffs and Invite Comparison....74
Handle Time Trust and Decision Concerns....76
Skills 13 Clarify Concerns Before Responding....77
Protect Scope and Follow Pricing Authority....79
Invite and Document the Decision....80
Integrated Presentation and Concern Roleplay....81
Phase 3 Knowledge and Application Assessment....82
Answer Key and Field Application....83

Table of Contents Continued

PHASE 4 DELIVERING THE PROMISE AND BUILDING MASTERY

Phase Overview and Learning Plan....84
Build a Handoff That Operations Can Use....85
Confirm Readiness Before Promising a Date....86
Skills 14 Confirm the Choice and Protect the Promise....87
Prepare the Homeowner for Installation....89
Verify Completion and Teach the Next Step....90
Respond to a Concern and Close the Loop....91
Follow Up with a Clear Purpose....92
Keep the Pipeline Accurate and Actionable....93
Invite Honest Feedback and Earn Referrals....94
Use a Balanced Weekly Scorecard....95
Coach a Behavior and Rehearse the Improvement....96
Build a Thirty-Day Development Plan....97
The Rivera Consultation....98
Release Information in Stages....99
Score the Process and the Record....100
Answer Guide and Coaching Plan....101
Capstone Case from Discovery Through Delivery....102
Capstone Performance and Scoring....103
Phase 4 Knowledge and Application Assessment....105
Answer Key and Final Field Development Record....106

Table of Contents Continued

Appendix A Training Tools and Final Exercise

Appointment Preparation and Visit Plan....107
Discovery and Customer Priority Record....108
Evidence and Technical Review Request....109
Suitable Options and Scope Comparison....110
Concern Response and Decision Record....111
Installation Handoff and Promise Register....112
Completion and Customer Concern Log....113
Follow Up Planner and Script Builder....114
Weekly Performance and Quality Scorecard....115
Coaching and Thirty-Day Practice Plan....116
Final Exercise Brief and Session Plan....117
Homeowner Role and Staged Information....118
Qualified Review and Options Release....119
Final Exercise Checkpoints and Required Outputs....120
Final Exercise Performance Rubric....121
Instructor Answer Guide and Final Debrief....122

Page numbers run continuously from the cover through the appendix. The Park Household Project remains the comprehensive final assessment.

Elite Closers Sales Training

Phase 1 Foundations and the CHOOSE PLUS Process

A practical instructor and participant guide for residential HVAC comfort advisors. This first phase develops the habits that make a complete sales conversation credible: prepare deliberately, understand the homeowner, explain verified findings, and help the customer choose with confidence.

The approach is **System Design + Customer Trust + Multiple Options + Confident Decisions.** Technical competence supports the recommendation. Respectful communication helps the homeowner understand it. The customer retains control of the decision.

What you will be able to do

By the end of Phase 1, you will deliver a clear introduction, establish an agreed visit agenda, uncover and confirm three customer priorities, distinguish observations from conclusions, and explain the CHOOSE PLUS sequence. You will also practice a complete conversation and receive feedback on observable behaviors.

How to use this guide

Read the lesson, hear the instructor demonstrate the skill, practice aloud, then repeat after feedback. Scripts are original practice examples; use your own natural voice while preserving their purpose. Bracketed items must be replaced with accurate company or appointment information. Exercises & scoring standards are for training, not requirements.

Learning block	Core lesson range	Suggested time
How to use this guide	1–2	15 minutes
Foundations and communication	3–14	95 minutes
CHOOSE PLUS application	15–25	80 minutes
Roleplay and assessment	26–31	70 minutes
CHOOSE PLUS skills practice	Throughout phase	93 minutes

Instructor preparation: Allow 5 hours 53 minutes of instruction and practice, plus breaks, including 93 minutes of integrated skills practice. Prepare a timer, sample inspection photographs, blank proposal, company-approved scope checklist, and a practice partner for each learner. No live equipment work is required.

Participant _____ Instructor _____
Training date _____ Next coaching date _____

Phase 1 includes the foundational lessons and four CHOOSE PLUS skills lessons. Later phases develop technical discovery, presentation, investment, objections, closing, and field mastery in depth.

The Comfort Designer Role

Teach 8 minutes Practice 7 minutes

A comfort advisor helps a homeowner connect a real problem to a suitable solution. The work includes understanding how the home is used, gathering reliable information, explaining choices, and documenting a decision. A polished presentation cannot compensate for an inaccurate recommendation or a customer priority that was never heard.

Three responsibilities

1) As a designer, connect the proposed scope to the home and the homeowner's goals.
2) As an educator, explain what the evidence supports in language the homeowner understands.
3) As a decision guide, compare tradeoffs and ask for a clear next step without taking away the option to decline.

> Advisor: "My job today is to understand what you want to improve, review the information about your home and system, and explain the choices that fit. I'll show you what each choice includes and where its limits are. Then you can decide what makes sense for you."

Use the title your company actually assigns. A sales title does not authorize electrical testing, refrigerant work, engineering judgments, or a diagnosis outside your training. When a finding needs specialist confirmation, make that handoff part of the process.

When the homeowner asks for the cheapest option

> Homeowner: "I don't need a sales pitch. What is the cheapest system?"
> Advisor: "I can show you the lowest-cost suitable option and its total price. To make sure it is suitable, may I first confirm what needs to be addressed and review the installation requirements? Then we can compare what you would gain or give up with other choices."

Answer a direct price question with the information you have. If the total is not yet known, explain what must be verified and when you will provide it. Avoid turning discovery into a condition for receiving information that is already available.

Exercise Rewrite your opening

Write two sentences explaining your role without awards, unsupported promises, or a product pitch.

_____

_____

Instructor: Ask partners to deliver the opening in 30 seconds. The listener identifies the advisor's purpose, what will happen, and who makes the decision. Repeat if any element is unclear. Coach accuracy and natural delivery rather than exact memorization.

Check for understanding: What would you do if the customer's priority is a hot bedroom, but your proposed equipment change does not address the suspected distribution problem? Expected direction: investigate the cause and explain the scope limitation before recommending.

Mindset and Appointment Preparation

Teach 8 minutes Practice 7 minutes

Preparation makes good judgment easier under pressure. A difficult previous appointment, a slow week, or a competitive quote can affect your tone. Recognize emotions before the next visit. Measure your preparation, listening, and follow-through alongside sales results; the homeowner's decision is not fully under your control.

Use a two minute reset

Pause and name the distraction. Separate a fact from your interpretation: "The previous customer declined" is a fact; "Nobody values our work" is an interpretation. Discuss one controllable action for the next appointment, such as confirming the homeowner's priorities before explaining equipment. Take a breath and enter with attention available for this customer.

> Private preparation statement: "I am prepared to understand this home and explain suitable choices. I can control my effort, accuracy, pace, and follow-through. I will learn from this appointment whether the homeowner buys today or not."

Prepare the appointment

Review the stated reason for the visit, previous authorized service information, arrival window, and any access needs. Check your identification, clean appearance, shoe covers, charged device, approved presentation materials, and measuring tools appropriate to your role. Confirm that current prices and written company policies are available. Research prepares questions; it does not establish someone's budget or preferences.

Situation	Unhelpful assumption	Useful next action
A modest home	They will only buy basic	Ask which outcomes matter and discuss budget respectfully
Three competing quotes	They only want the lowest price	Ask how they plan to compare scope and service
A late previous call	I must rush discovery	Update arrival time and agree a realistic visit window

Exercise Reframe a recent call

What happened as an observable fact? _____
What did I assume? _____
What will I do differently on the next appointment? _____
_____

Instructor: Allow two minutes to write and three to share. Do not reward forced optimism or blame the learner for market conditions. Ask for one behavior within the learner's control and a way to observe it. Revisit that behavior during the capstone.

Field habit: Finish the reset before driving or while safely parked. Record the learning point after the appointment, then prepare for the next household as a new situation.