

1. Pre-Arrival: The Mindset Shift

- ☐ **The "Curb Appeal":** Is the truck parked where it doesn't block the driveway? Is your uniform crisp and your badge visible?
- ☐ **The Homework:** Did you review the lead notes? (e.g., "Customer mentioned a cold nursery" or "Unit is 20 years old").
- ☐ **Tool Check:** Tablet charged? Flashlight handy? Boot covers (booties) ready to go?

2. The Greeting: Building the Bridge

- ☐ **The "Bootie" Protocol:** Put on your shoe covers at the door. It signals immediate respect for their home.
- ☐ **The Permission Ask:** "Where would you like me to set up my things while I work?"
- ☐ **The Agenda:** Give them a roadmap. "First, you can tell me what's going on with your system, then I'll do some diagnostics, and finally, we'll give you some options and do whatever sounds easiest to you. Sound good?"

3. Discovery: Finding the "Why"

- ☐ **Beyond the Box:** Don't just ask about the AC. Ask about **comfort**.
 - "Which room is never the right temperature?"
 - "Does anyone here suffer from allergies or dust issues?"
 - "Does your electrical bill go way up in the summertime?"
- ☐ **The Lifestyle Check:** Do they work from home? Are they planning to stay in the house for 5+ years?

4. The Technical Audit: Trust through Transparency

- ☐ **The Photo Tour:** Take photos of the old unit, the ductwork, the filter, and the electrical panel. (Use these to *show*, not just *tell*).
- ☐ **The "Health" Check:** Look for signs of trouble beyond the mechanicals (mold, disconnected ducts, poor insulation).
- ☐ **The Static Pressure Talk:** If you're doing a load calc or pressure test, explain *why* it matters for their specific comfort issues.

5. The Presentation: Solutions, Not Specs

- ☐ **The "Good-Better-Best" Framework:** Open your **SetSale app**, select the appropriate **System Template** (e.g., AC + Furnace), and enter the system specs to automatically populate your tiered options.
- ☐ **Enhance the Value:** Add at least four optional Upgrades (like IAQ products or surge protectors) to the quote to give the homeowner choices that increase the project's overall value.
- ☐ **The Review & Share:** Use the Present Quote feature to walk the homeowner through the proposal on your tablet or click the share button to send the full presentation directly to them via email or text.
- ☐ **The "One-Legger" Protocol:** If a spouse or decision-maker is not present, use the Share function immediately to send the pricing-only summary or full proposal to the missing party so they can review the tiers in real-time.

6. The Close: Clearing the Path

- ☐ **The Monthly Math:** Always present the monthly investment (financing) alongside the total price.
- ☐ **The "What's Next":** Explain the install process. Who shows up? How long does it take? How do we protect their floors?
- ☐ **The Ask:** "So we know what the problem is and what the options are, so what should we do?"

7. Post-Sale: Setting the Success Stage

- ☐ **The Hand-off:** Take "Install Photos" (the path to the unit, the workspace, etc.) so the crew isn't walking in blind.
- ☐ **The Schedule:** Confirm and reconfirm the exact date and time.
- ☐ **The "Thank You":** A simple, sincere thanks for the trust they're placing in you.