



# New Construction – Residential

## Sales Process

Office - (not the sales person)

- Answer all calls
- Set an appointment with homeowners (builder should attend but homeowners are a must)
- Have the customer Email the building prints several days prior to visit
- Confirm appointment the day before

Sales – Office work

- Do an Estimating takeoff – (For assistance contact [www.ICDz.co](http://www.ICDz.co) )
- Work up an estimate/ proposal
- Buy an EMA comparison Report from EnergyModelingAgency.com
- Buy an EMA IECC compliance report from EnergyModelingAgency.com
- Buy an EMA customized PowerPoint Presentation EnergyModelingAgency.com
- Work up a Builders Worksheet

Sales – 1<sup>st</sup> Appointment

- Confirms appointment – en route (professional attire is a must)
- Present the customized EMA PowerPoint presentation from EnergyModelingAgency.com
- Present the EMA comparison Report and thoroughly explain it
- Present the Builders worksheet and explain it – line by line
- Present the Estimate/Proposal (print the PowerPoint Presentation and add to proposal)
- Ask for the commitment – signed proposal and/or deposit check

Sales – Follow-up (without a signed proposal) Follow up at least 5 times

Sales – Follow up (With Signed Proposal)

- Contact code official and simply ask “may I have your email address so I can forward all compliance documents” (no need to explain anything to the code official)
- Simply forward the entire email and attached compliance documents that you received from EnergyModelingAgency.com (that’s all you need to do for code compliance)
- Contact the HVAC contractor to help right size HVAC (have them run a Manual J or downsize by at least 1/3)
- Schedule install
- Follow up after install. Take pictures/video to be up loaded to your website and Facebook
- Get Testimonials – video or written