



WIN AT THE KITCHEN TABLE

The Residential HVAC Sales Playbook

For **Comfort Consultants**, **Sales Managers**, and **Business Owners**



Preface

Build a Better Business

This guide is dedicated to residential HVAC Comfort Consultants, sales managers, and owners. We know how hard you work, and we know the difference a good sales process makes. We also know that “**better**” means different things to different owners. This guide is written around three reasons you might want to build a better business.

- If you want **more growth** and need a repeatable process to scale beyond yourself.
- If you run a **family business** and want your life back (with quotes finished at the customer’s kitchen table instead of yours later that night).
- If you are **preparing for an exit** and want a documented sales process that a buyer will value.

We hope this guide helps you sell more in less time, make a profit on every job, and build a better business, whatever better means to you.



John Steidley

*Founder & CEO
Intelligent Mobile Support, Inc.*

How this guide works

Companies that get where they want to go don’t necessarily have the most talented closers. But they do have a sales process. They know what homeowners are really buying. They prepare before the call, and their consultants run the same sales call the same way every time. The companies that struggle usually just wing it. And their results swing depending on who happens to be on the call.



PART ONE

Understand

What homeowners actually buy. We’ve wrapped seven key buying factors into a memorable acronym: COMFORT.



PART TWO

Prepare

Price for profit, qualify leads, and call ahead. Many calls are decided before they even start.



PART THREE

Win

A nine-step sales call that either wins at the kitchen table or sets up the follow-up win.

Two Businesses in One

Your HVAC business is really two businesses in one: service and sales. Service runs on speed: dispatch, diagnose, fix, credit card swipe, next call. A system replacement is a different job entirely: a major purchase built on trust, decided by a family at their kitchen table. Yet many contractors try to run both sides on one piece of software, their service platform, and the mismatch shows up exactly where it matters most: when you are trying to close the deal.



SERVICE

Built for speed. Dispatch, diagnose, fix, credit card swipe, next call.



SALES

Built on trust. A family decision, won or lost at the kitchen table.

*Service software is built for speed. Sales calls are built on trust. One contractor's close rate jumped 12 percent when his sales team got a tool built for their job.**

Service software is excellent at service. But when the presentation at the table turns into a service ticket with a big number on it, it doesn't build value or trust. You see the mismatch in the numbers: lost deals, shrinking margins, and complex jobs, ductless above all, that die at the quoting stage. The answer is a purpose-built sales tool: software designed for the in-home sales call that builds professional, error-free proposals at the kitchen table, even for tricky ductless jobs.

12 pts

Close-rate jump with a purpose-built sales tool*

5 pts

Gross margin gained on every job*

2X

Business doubled, then a happy retirement*

3X

Grew from \$20 to \$60 million*

*References available

Your service software should keep doing what it does well. Your sales team needs a tool built for their job. The rest of this guide is the process; the right tool is what makes it repeatable.

***“Is your software built to help you service,
or built to help you sell?”***

What Homeowners Actually Buy

Nobody wakes up wanting a heat pump. Homeowners want a master bedroom that finally cools down, utility bills that stop climbing, or a system they cannot hear from the couch. Equipment is how you deliver those things; customers buy comfort. Homeowners usually buy some combination of these seven key experiences, organized here into a memorable, if contrived, acronym to frame your discovery conversation.

Seven COMFORT Factors



C Cleaner, Healthier Air

Lead with better air quality; almost nobody else does. Premium equipment paired with the right filtration and installed correctly creates the opportunity for a healthier indoor environment.

⚠️ A word of caution. You can't guarantee your customers will be healthier (that's a medical outcome).



O Optimal Humidity

Comfort lives in the middle of the humidity range. Too dry cracks skin and furniture; too damp feels sticky and can foster mold or mildew. Modern systems manage moisture, not just temperature.



M Money Saved on Utility Bills

Efficiency is real money every month, and it is the benefit homeowners already know to ask about. Connect it to their actual bills, not to rating acronyms.



F Airflow, Better Everywhere

Weak airflow is why one room never gets comfortable. Fixing air distribution is often another difference a homeowner can actually feel.



O Quieter Operation

The best systems disappear into the background. Quiet is a luxury homeowners didn't know they could buy until your consultant tells them.



R Rest: A Better Sleep Environment

We spend a third of our lives asleep, and a cool, quiet, even airflow environment may help your customers sleep better.

⚠️ A similar word of caution here. You can't guarantee your customers will sleep better.



T Even Temperatures, Room to Room

No more abandoned bonus room. Even temperatures are what *"it just works"* feels like.

A framework, not a script. No homeowner cares about all seven, and a consultant who recites the list sounds like a brochure. In a real home, three or four of the seven matter. **Discovery** is how you find out **what matters most**.

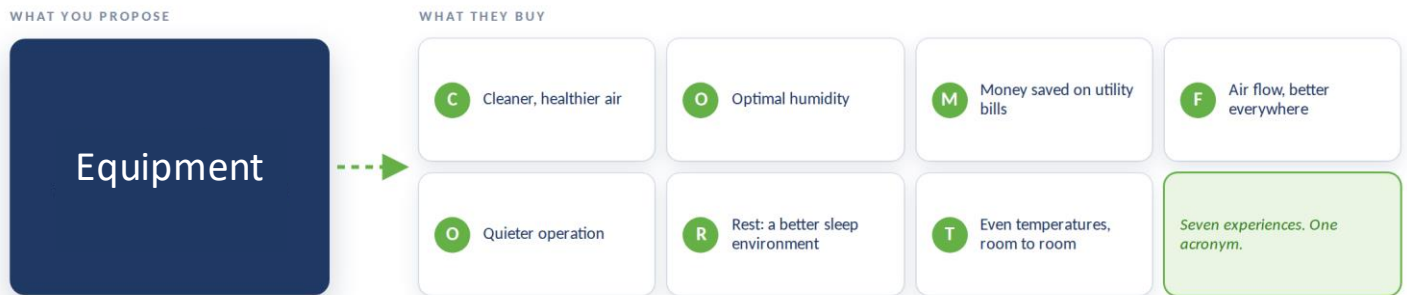
Sell Comfort, Protect Margin

COMFORT works in the background. It's a reminder to keep your conversation focused on benefits the family actually needs. Why? If your discovery is working, the family already told you what matters most to them because you asked. The idea is to keep equipment specs where they belong, available on request but never leading. That last point deserves its own sentence, because it is the most common selling mistake in this industry:

“Never lead with a spec. A SEER2 rating never made anyone comfortable.”

Translate every feature into the experience it delivers. Let the specs back you up when you need them.

Why this matters to your business. Selling comfort is a strategy for higher ticket prices and margins. Companies that compete on equipment specs compete on price. That's a race to the bottom you don't want to win. But if your consultants actively listen, document the family's needs room by room, and propose a solution matched to what they said, you're creating value most competitors cannot match. It is why a comfort-led sales process supports profitable pricing.



The comfort conversation is the one most competitors are not having.

HOW SALES BUILDER PRO HELPS

The Comfort Survey documents which of the seven COMFORT factors matter most in this home, room by room, in the homeowner's own words. Every follow-up call starts from what the family actually said.

The digital brag book (Home tab or Presentation) holds your air quality videos, brochures, and before-and-after photos. Think of this as a library to draw from when a topic comes up, not a lecture for your customer to sit through.

Timeline tracking shows what was presented in the home, in what order, and for how long, so you can coach the comfort conversation instead of guessing.

PART TWO

Prepare to Win

Preparation boils down to three jobs. First, set profitable prices and approved discounts, so consultants never price on the fly. Next, qualify leads, so your best hours go to real buyers. Finally, call ahead and arrive on time, so the visit starts with trust. None of the three requires exceptional talent. All three require exceptional discipline and intention.



PRICE FOR PROFIT

Profitable prices set in advance.
Discount authority decided
before negotiation, not during it.



QUALIFY LEADS

Same questions, same order, every
time. Send your consultants to
where the buyers are.



CALL AHEAD

Confirm twice (the day before
and the day of), share your ETA,
and learn who will be home.
Trust starts before you knock.

***“Many sales calls are won or lost
before you ever knock on the door.”***

Price for Profit

Never wing it. Set profitable prices (and discounts) for all products, labor, install materials, and services in advance, so your Comfort Consultants can focus on the customer during the call instead of doing math in the driveway.

- **Profit.** Cover all your costs and make a profit on every job. Your customers need you to be profitable too. They need you to be in business to maintain and service what you sold them.
- **Discounts.** Decide discount authority before negotiations, not during them. Many contractors set a dollar cap (or % limit), where half comes out of the rep's commission. When the discount is partly their money, most reps spend it more wisely.
- **Market conditions.** Cost-plus pricing overprices in weak markets and underprices in strong ones. Develop and deploy a price adjustment plan for seasonality, supply chain, labor, competition, and difficult job sites.

Whether you price by gross margin, markup, or day-rate labor, the arithmetic must be right on every line of every quote. Studies have found errors in the large majority of spreadsheets. Spreadsheets are fine for sharing data but a poor place to run your pricing model.



Manage Margin. See the profit built into your price book before you build a single proposal. Profitability is color-coded and shown in spendable dollars (\$) and percentages (%) for easy comparisons.

HOW SALES BUILDER PRO HELPS

Pricing Engine. Once you create a set of business rules (or use recommended defaults) for pricing, the pricing engine does the math for you. No more wondering if taxes, costs, margins (or markup), and/or day-rate labor are properly accounted for in your pricing.

Seasonal price adjustments apply a season or an announced price increase across the whole book in minutes.

Install Manager Pro recommends install materials and assigns risk hours to unpredictable tasks, so difficult job sites stop eating margin through part runs, rollovers, and callbacks.

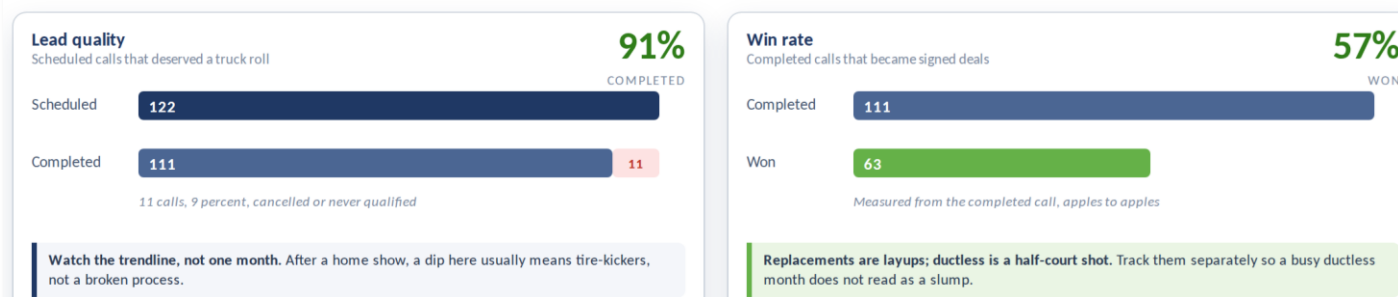
Qualify Leads

Establish a short list of lead-qualifying questions, ask the same questions in the same order every time, and track the answers. Soon you will know which questions predict the call outcome, and your consultants' time will go where the buyers are.

- **Is the heat or AC out?** If your service team has determined a repair is out of the question, they are highly likely to buy. In basketball, these are called layups. Yes, you can still miss or get blocked. But these calls are your bread-and-butter sales calls.
- **Is someone else already servicing the equipment?** If yes, why are they calling you? A referral is a good sign. A price shopper is a red flag worth knowing early.
- **Do they have specific needs?** A hot or cold room problem? A bedroom that's too hot to sleep well in July? A noisy unit near the patio?
- **Who lives there?** How long do they plan to stay? Who will be involved in the decision? The home's age is on Zillow; don't waste a question asking about it.

When time is of the essence. A "no-heat" or "no-AC" call is a very different animal from "We're thinking about adding AC to the bonus room." In an emergency sale, the homeowner needs their house back. Now. Qualify quickly, but don't skip the qualifying. Confirm who will be home and when. Speed is part of the value you bring to the table. The first professional rep through the door wins most deals.

QUALIFY LEADS Two numbers to watch.



Rendered illustrations, not actual Sales Builder Pro screenshots.

One contractor found that 9% of scheduled calls did not result in a proposal and reported a 57% close rate.

Are these results good or bad? On their own, they're hard to judge. Some scheduled calls are not true sales opportunities: homeowners change their minds, have no immediate need, or cannot afford to buy or finance a replacement. Lead sources and seasonality also affect the numbers. A surge of home-show appointments, for example, may bring more tire-kickers. Watch both measures over time. A change in the no-proposal rate can reveal a shift in lead quality, while a change in the close rate can reveal a shift in sales performance. Owners need to monitor and manage both.

HOW SALES BUILDER PRO HELPS

Win-Loss Reports. Deep-dive detail to get monthly, seasonal, or per-rep trends. On per-rep rates, make sure some reps (e.g., the owner's son) aren't getting all the layup shots.

Win-rate Context. Replacement HVAC sales are your layups. Ductless sales can feel like a half-court buzzer beater. Give your team ductless design tools to give them the best possible shot on every call.

Marketing vs. Sales. If win rates drift down, you might be chasing too many unqualified leads.

Call Ahead

Time is money for you and your customer. Confirm the appointment the day before and again the day of, then share your ETA when you are on the way. Today, that level of communication does not set you apart; it is table stakes. Customers expect it, and online reviews show how quickly they lose confidence when a contractor arrives late or leaves them wondering.

THE CONFIRMATION CALL



How much time will we have for the appointment?



Do you have a hard stop?



Who will be there?

If only one decision-maker can be home, plan for a one-legged call. Step 9 shows how Sales Builder Pro can help close these out.

8.2%

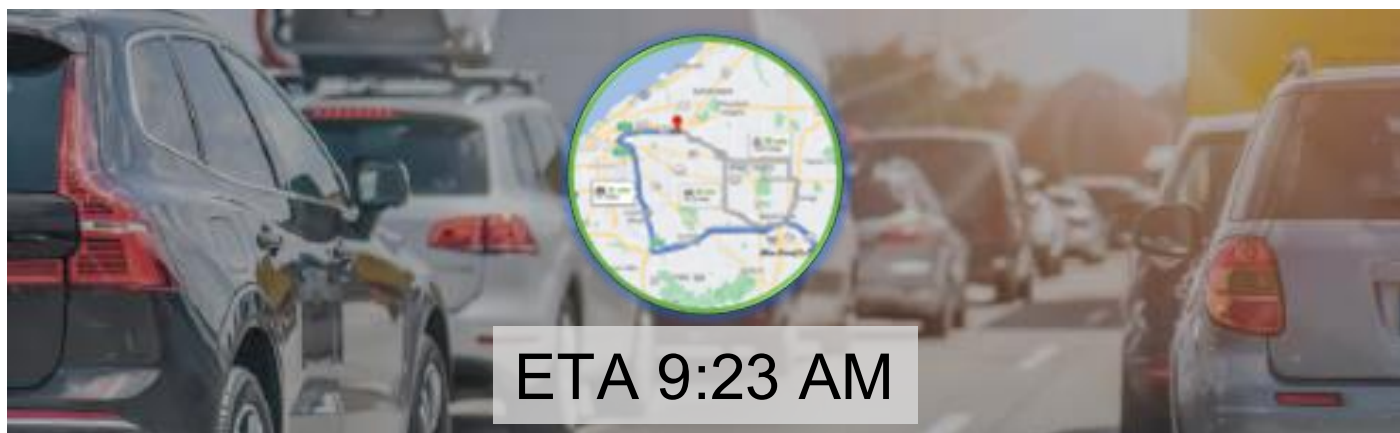
Higher close rate on evening and weekend calls, when both decision-makers are home. Schedule accordingly.

2x

Confirm the day before and the day of.

Then share your ETA on the way.

Finding out who will be there determines the outcome ahead of time. And a consultant who confirms, arrives on time, and walks in prepared has built trust before the first word at the door.



Sales Builder Pro maps the job site against your consultant's location and produces a traffic-aware ETA worth sharing.

HOW SALES BUILDER PRO HELPS

Google Maps is built in. If you don't yet have an ETA app, Sales Builder Pro includes a traffic-aware ETA, so "on my way" comes with a time attached.

Works alongside Field Service Management (FSM) systems. "Works alongside Field Service Management (FSM) systems. Keep using your FSM system to schedule, dispatch, track time, monitor GPS, and send automated ETA messages. Sales Builder Pro is the specialized tool you'll use to close the sale at the kitchen table and to track and win follow-up deals."

The Nine-Step Sales Call

This section covers the sales call itself, from the knock on the door through follow-up. You probably use many of these steps already, but most of us have room to improve somewhere. Use this nine-step process to assess yourself or your team. Rate your performance at each stage. Identify your strengths and weak spots. Then, commit to improving one step at a time.

- 1 Arrival, Greeting, and Establishing Rapport
- 2 Discovery of Wants and Needs
- 3 The Job Site Walk-Through
- 4 Proposal Preparation
- 5 Delivering the Proposal at the Kitchen Table
- 6 Answering Questions
- 7 Closing: Asking for the Order
- 8 Wrap-Up
- 9 Follow-Up: Converting The Think-It-Over Buyer

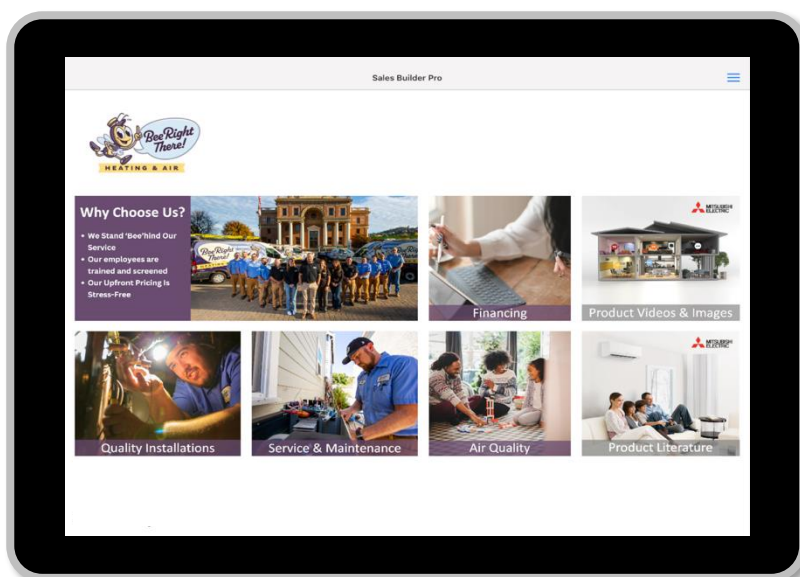


PRO TIP

Grade Yourself, Then Pick Your Battles. Rate each of the nine steps as a strength, a weak spot, or a lost sale waiting to happen. Keep sharpening your top two strengths. But **commit to fixing just one or two weak spots** this season. Trying to overhaul all nine at once is how nothing changes.

Arrival, Greeting, and Establishing Rapport

Trust begins before you even say “Hello”. You arrive when promised. Your consultant looks professional. Professional branding on your tablet reinforces your company's commitment to quality and professionalism when your consultant opens it up. Rapport is more than small talk. Rapport means bringing the care and judgment of a trusted family member to an expensive decision. Consultants who earn that level of confidence stop being seen as salespeople and become trusted advisors.



Actual Sales Builder Pro screenshot and PDF, shared with permission.

*A brand is a promise. Pro Branding shows the homeowner who's making that promise. It's your people, your work, your reputation. **Keep the promise, and the sale follows.***

HOW SALES BUILDER PRO HELPS

Pro Branding helps you stand out from the crowd. The last thing you want is for your proposal to look like just another service invoice. Tell your story with pride. Brag about your people and your process. Explain how you deliver more value than the next guy.

“Why Choose Us?” content in the “digital brag book” puts your reviews, before-and-after photos, and value proposition one tap away when the conversation turns to “why you?”



Pro Tip. Build this up over time. After every call, or once a week, figure out what material would have helped with this customer. Add it to your book. In time, you'll build an enviable library of resources, ready for what comes next.

Discovery of Wants and Needs

The homeowner needs a working system, and any contractor can sell them one. What they buy, and from whom, is decided by what they want: which of the seven COMFORT factors matters most for this family? Discovery is structured listening: room by room, who sleeps where, which rooms get avoided, what the bills feel like, what the system sounds like at night.

The consultant's job is to capture the homeowner's own words, because those words come back at the kitchen table as the reasons to say yes.

Customer's Name:		Job Address:	Date:
Susan Homeowner		101 Main Street Anytown, USA	09/02/2026
Customer's Billing Address:		City, State, Zip:	Customer #:
101 Main Street		Anytown, USA	
Home Phone:	Mobile Phone:	Email(s):	Job #:
	(888) 555-1212	susanhomeowner47@gmail.com	

COMFORT - What Matters Most?

C - Cleaner Air. What have you noticed about dust, odors, allergies, or the overall air quality in your home?

O - Optimal Humidity. How does your home feel during dry winter days? Humid summer days?

M - Money Saved. What are your utility bills like during the hottest and coldest months?
... any relief here would be great, this is our forever home, and we're on a fixed income ...

F - Better Airflow. How does the airflow feel throughout the house? Which rooms could use more air?

O - Quieter Operation. Can you hear your system when it first starts up? Is it noisy when it runs?

R - Rest. Tell me about nighttime comfort. Is every room good for a restful night's sleep?
... my husband couldn't sleep a wink in July, too dang hot, he says ...

T - Even Temperatures. How does temperature vary from room to room? From floor to floor?
... it is brutal upstairs. Fix that, and I'll bake you a pie ..."

The Comfort Survey captures the homeowner's words room by room. Every follow-up call starts with what the family actually said.

HOW SALES BUILDER PRO HELPS

The Comfort Survey guides the conversation and documents everything, saving to the cloud automatically. It is like the consultant never left the home.

Customizable questions tune the survey to your market, with checkboxes and drop-downs that keep the data clean.

3

STEP 3

The Job Site Walk-Through

The walk-through turns wants into a buildable job: the consultant documents the existing system, measures what needs measuring, and photographs* everything the install crew will need. When indoor unit locations are decided, get them signed; a homeowner's signature on placement prevents the most expensive kind of misunderstanding.

This step is where installation profitability is protected. Unscheduled rollovers happen for the same reasons every time: missing information, poor recordkeeping, and miscommunication between sales and install. Photo documentation kills all three.



Draw on photos to show exactly where everything goes. No part runs, no rollovers, no “nobody told me.”*



***Pro Tip. Gain Consent.** Always get permission before taking photographs.

You might say something like this:

“I’m the eyes for our install crew. Do you mind if I take a few pictures to document what I see so our install goes smoothly?”

HOW SALES BUILDER PRO HELPS

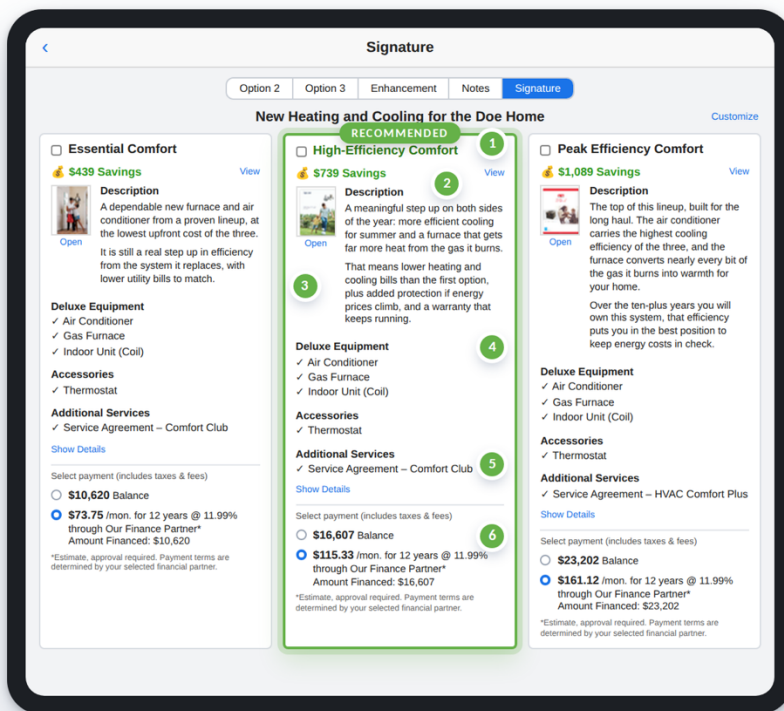
The Site Survey captures pictures and data in one place, with drawings on photos to show exactly where everything goes. Indoor unit placements drawn on photos, and signed, feed straight into the ductless design.

Automatic cloud storage means the install crew, the office, and the consultant are all looking at the same job.

Proposal Preparation – Conventional Equipment

Two judgment calls before proposing anything. First, the right level of solution: repair, correct, supplement, or replace. A company known for honest repair recommendations owns the replacement when it comes. Second, a readiness check: is the discovery complete enough to propose a solution? Building a proposal for a job you do not understand is how orders are lost.

Then build the options: tiered choices, each named for what it delivers rather than good, better, or best, with the recommended option labeled. The recommendation is the fit for what this family said they wanted, not the biggest ticket the consultant can justify. Three options let the homeowner steer while your consultant keeps an honest hand on the wheel.



ANATOMY OF A PROPOSAL

Build It Before You Sit Down

Six things every option needs before the kitchen table.

- 1 **Three named tiers**
Essential, High-Efficiency, Peak. One is flagged as your recommendation.
- 2 **Savings badge**
Rebates and discounts totaled where the homeowner sees them first.
- 3 **Plain-language description + brochure**
Benefits, not specs. Tap Open for the manufacturer brochure.
- 4 **Equipment, accessories, services**
Everything included, listed by name. Show Details for the tech.
- 5 **Comfort Club**
Maintenance built into every option, not an afterthought.
- 6 **Monthly payment, ready to compare**
Financing pre-loaded so "all up front, or over time?" has an answer.

HOW SALES BUILDER PRO HELPS

Properly priced options come straight from your price book, so your margins stay intact. Pricing, tax, and financing math are automatic.

Enhancements tabs make it effortless to include the air quality and comfort items the discovery surfaced.

Install Manager Pro builds the bill of materials and labor risk hours while you build the proposal.

Proposal Preparation – Built-in Ductless Design Tools

How It Works. For leading ductless brands, Sales Builder Pro offers ductless design tools that let you quote multi-room ductless jobs on the spot. Enter your local design criteria once: indoor and outdoor temperatures and altitude. From then on the app offers only compatible matchups, puts guardrails on pipe runs, and corrects capacity for temperature, line length, defrost, and combined load. It recommends required and optional install materials automatically: line sets matched to port size, adapters, extra refrigerant, and compatible accessories. As one contractor put it, “This app won’t let you make a mistake.”

ONE-TIME SETUP

System	Components	Ductless
Design Criteria		
	Cooling	Heating
Indoor Temp	74 °F WB	68 °F DB
Outdoor Temp	95 °F DB	5 °F WB
Altitude	850 ft	

SUPPORTED DUCTLESS BRANDS

- Mitsubishi Electric Trane
- LG
- Fujitsu
- Lennox Powered by Samsung
- Carrier
- Bryant
- Midea

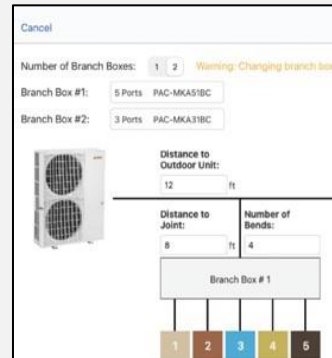
NOTE: You may quote *any ductless brand on Sales Builder Pro*, but only supported brands include design tools, guardrails, and automation.

3 STEP DESIGN

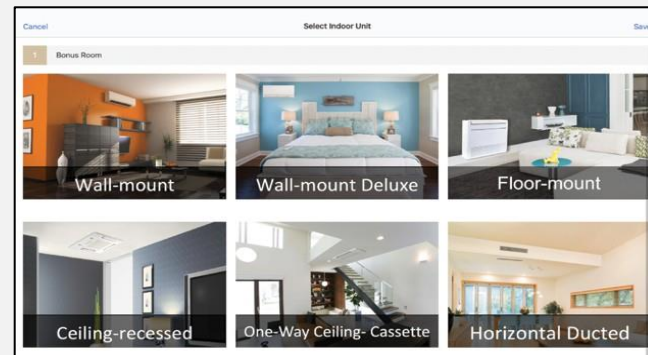
Select ODU

Outdoor Unit	
Type	Heat Pump
Manufacturer	Mitsubishi Electric
Model	MXZ-3C30NAHZ2-U1
Cooling BTU Rated	30,000
Heating BTU Rated	28,600
SEER EER HSPF	18 12.5 11
Indoor Units	2 3
Warranty/Guarantee	Parts: 5 Year Labor: 1 Year Compressor: 7 Year

Layout



Select IDUs



RESULTS

Designed Ratings

Cooling	1	2	3	BTUs	23,271 / 26,130
Heating	1	2	3	BTUs	23,169 / 23,171
1 Bonus Room MSZ-EF09NAB-U1 Cooling Heating BTU Rated 9,000 10,900 BTU Designed 7,757 7,723 Wall-mount					
2 Sun Room SEZ-KD09NA4R1TH Cooling Heating BTU Rated 9,000 12,000 BTU Designed 7,757 7,723 Horizontal Ducted					
3 Man Cave - Wishful Thinking MFZ-KJ09NA-U1 Cooling Heating BTU Rated 9,000 11,000 BTU Designed 7,757 7,723 Floor-mount					

Automated Bill of Materials

NTXMMX20A122A (MXZ NA2) (Outdoor Unit)					
Labor	4	hours	Standard Labor		
Install Kit	1	each	Standard Install Kit		
Mounting Pad	1	each	Outdoor Unit 3-1/4 inch Mounting Base (Pair) - Plastic (OSD-400P)		
Disconnect Box	1	each	Disconnect Box		
Electrical Whip	1	each	Electrical Whip		
NTXWPH12A112A (MSZ-FH) (Wall-Mounted Deluxe) - Bedroom #1					
Labor	4	hours	Standard Labor		
Install Kit	1	each	Standard Install Kit		
Lineset (Pre-Cut)	1	each	1/4" x 3/8" x 50' Lineset (1/2" Twin-Tube Insulation) (MLS143812T-50)		
Disconnect Switch	1	each	30A/600VUL (fits 2" x 4" utility box) - Black (TAZ-MS303)		
NTXCKS09A112AA-3D (SLZ-KF) Requires TLP-18FAU grille (Ceiling-Recessed) - Bedroom #4					
Labor	4	hours	Standard Labor		
Install Kit	1	each	Standard Install Kit		
Lineset (Pre-Cut)	1	each	1/4" x 3/8" x 50' Lineset (1/2" Twin-Tube Insulation) (MLS143812T-50)		
Grille	1	each	Grille (TLP-18FAU)		
Disconnect Switch	1	each	30A/600VUL (fits 2" x 4" utility box) - Black (TAZ-MS303)		

Install Guide (PDF)

Indoor Unit Selections			
1	Model: LCN128HV4 2x2 (Grille Required)	Location: Living Room	
	Distance to Outdoor Unit:	Height Above Outdoor Unit:	Number of Bends:
	15 ft	10 ft	2
2	Model: LMN079HVT High Efficiency	Location: Bedroom #1	
	Distance to Outdoor Unit:	Height Above Outdoor Unit:	Number of Bends:
	29 ft	10 ft	7

Actual Sales Builder Pro screenshots (zoomed-in sections), various brands.

Why It Matters. Contractors using Sales Builder Pro grow faster, spend less time, and sell more ductless. They eliminate delays in getting quotes to customers. They eliminate most nights and weekends spent using another design tool and then converting data into a proposal. In short, they can focus more time on discovery and finding solutions and less time on busy work.

Delivering the Proposal at the Kitchen Table

The delivery order matters: benefits first, in the homeowner's own words from discovery, then the options, then price and payment. Show value first and keep specs on request; the homeowner who asks for the spec sheet gets it instantly, and the one who does not is never buried in it.

When money enters the conversation, one neutral question opens it well: "Would you like to pay for this all up front, or would you rather pay for it over time?"



HOW SALES BUILDER PRO HELPS

The interactive presentation keeps OEM pictures, brochures, and videos at the table; brochures attach to the customer's email automatically.

Show or hide details per audience: full specs for those who ask, benefits for everyone else.

Real-time editing means adding an accessory or adjusting an option happens at the table in seconds.

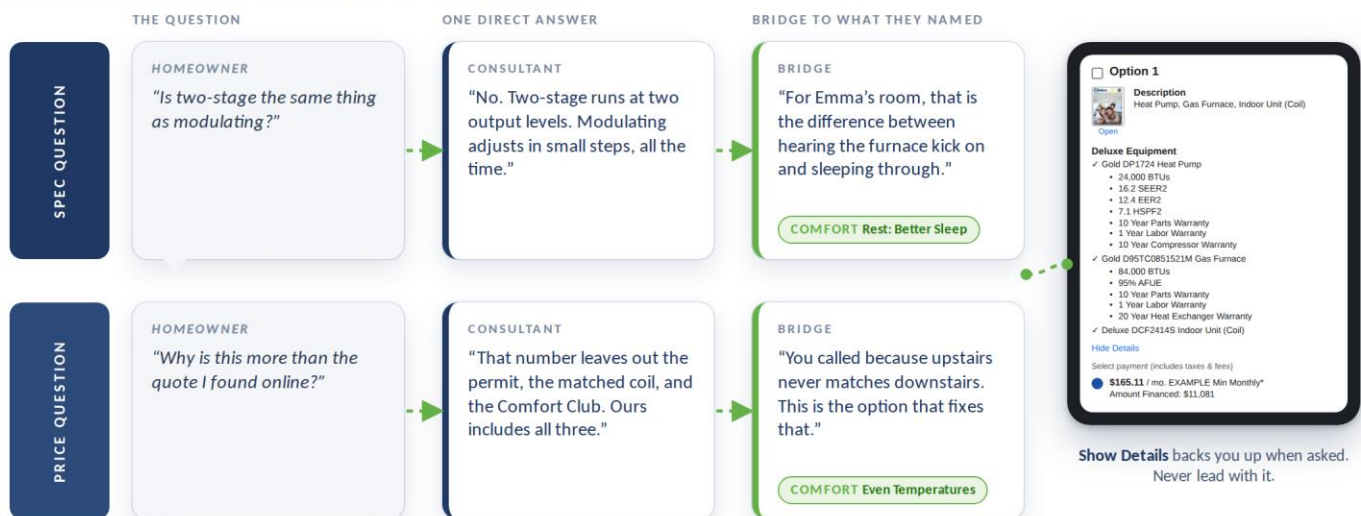
Answering Questions

What others call objection handling, we call answering questions. A homeowner asking hard questions is a homeowner deciding, and the consultant's posture should be a knowledgeable friend, not a debater. Here is a pattern that works well: answer the question directly (even if you need to say "no, but ..."), then bridge back to the benefits the family named.

Spec questions get a spec answer and a translation. Price questions usually are not about price; they are about value not yet established, which is why the steps before this one matter more than any rebuttal.

"Price questions are usually about value not yet established."

ANSWERING QUESTIONS Answer once. Then bridge.



Answer once, directly, then bridge back to the benefits the family named. Show Details is there to back you up when asked.

HOW SALES BUILDER PRO HELPS

Instant documentation settles factual questions on the spot: warranty terms auto-filled, brochures one tap away, financing math recalculated live.

The digital brag book answers "can you really do this?" with your own installs, reviews, and certifications.

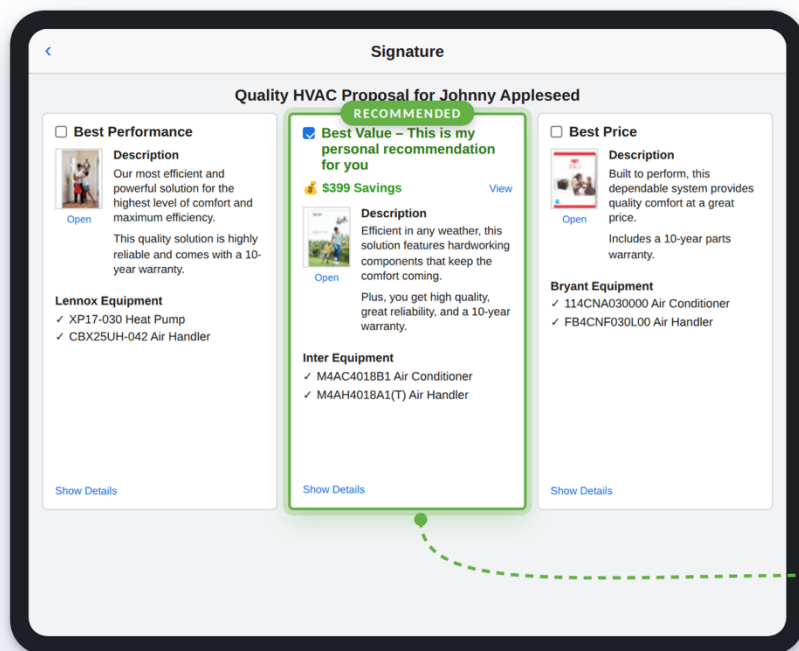
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STEP 7

Closing: Asking for the Order

Somebody has to ask. A soft close does it without pressure: “Is there any reason we can’t move forward today?” Then give the homeowner room to accept or to surface the real concern.

If the concern is money, financing converts a big-ticket price into a monthly payment built on a real program, honestly presented. Most buyers do not have the cash for an emergency replacement, and offering a payment path is a service, not a trick.



ON THE TABLET

Recommend & Compare Payments

Best Value • \$399 savings

Cash Price ☒ Finance Price ☐

Recommend Compare

☐ Cash Price ○

☒ 5 Year ●
\$91.38 /mo for 5 years*
 + \$3,500 down payment

☐ 4 Year ○

☐ 3 Year ●
\$152.31 /mo for 3 years*
 + \$3,500 down payment

☐ 2 Year ○

☐ 1 Year ●
\$456.92 /mo for 1 year*
 + \$3,500 down payment

Relax. We do the math. The app calculates monthly payments instantly for every program you offer.

HOW SALES BUILDER PRO HELPS

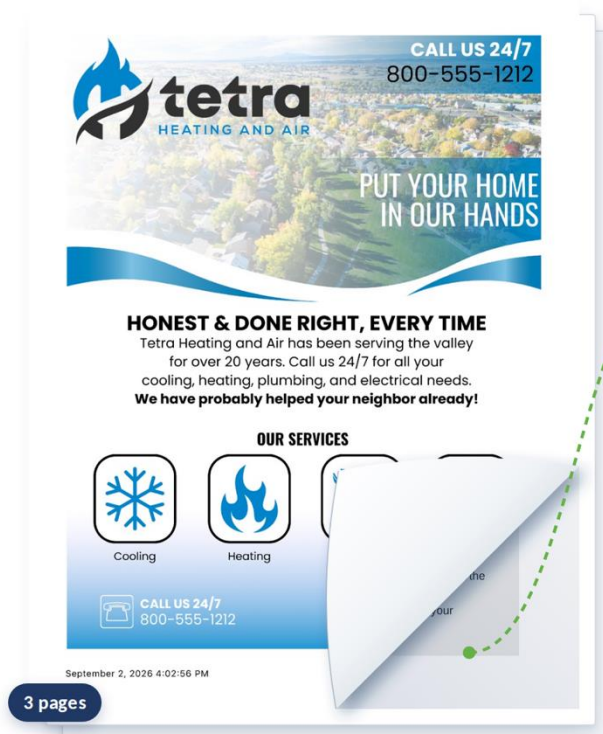
Every financing program you offer appears instantly. The monthly payments are calculated automatically. We work with everyone. No lock-ins. No lock-outs.

On-app signature capture turns a yes at the kitchen table into a signed proposal on the spot.

Wrap-Up

Whether signed or still deciding, the call ends the same professional way: confirm what happens next. If it's a "win," you'll set expectations for the installation day (when the crew arrives, how long it takes, what the house will look like when they leave), and thank the family for their time. If it's a "wait," you'll plan when and how to follow up.

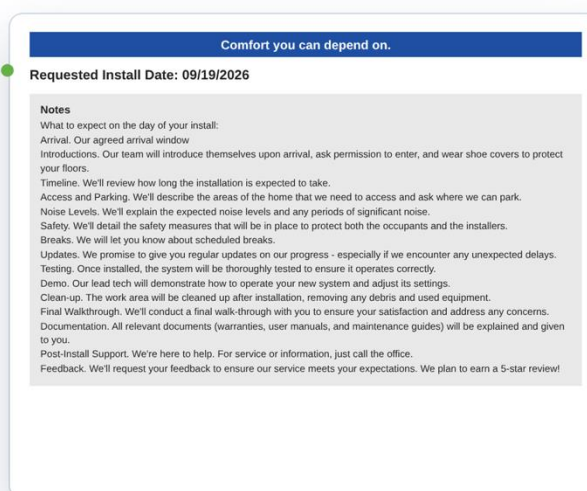
The quality of the handoff sets the stage for the quality of the install. For a signed deal, wrap-up hands the job to operations. Agreed-upon and documented next steps leave nothing to chance.



WHAT'S INSIDE

Agreed Upon Next Steps

Install date: 09/19/2026



Everything operations needs, in one place. The quality of the handoff is the quality of the install.

HOW SALES BUILDER PRO HELPS

Deal Manager keeps the Proposal, Comfort Survey, Site Survey with photos, bill of materials, piping layouts for ductless, cost analysis, and more, all in one place.

Deal notes carry color-coded, job-critical details to everyone who needs them.

Remote Acceptance lets the office accept a pending deal by phone with a full audit trail.

Follow-Up: Converting The Think-It-Over Buyer

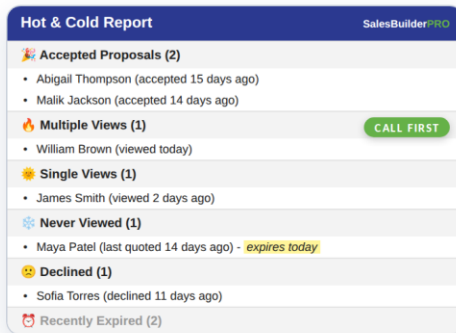
Some customers must think it over even when they have already decided; it is just in their DNA. Follow-up is a process, not a personality trait. Never leave the home without an agreed-upon next step. Every morning starts with a prioritized call list, and deals are worked by age.

The one-legged call gets its rescue here. When one decision-maker was missing, send the absent partner the same personalized proposal presented in the home: identical options, savings, rebates, and brochures, on their own phone, with electronic signature ready.

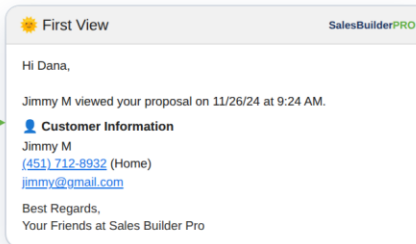
*“You stay in control of the deal.
They stay in control of the decision.”*

FOLLOW-UP Before your first coffee.

1 WHO TO CALL



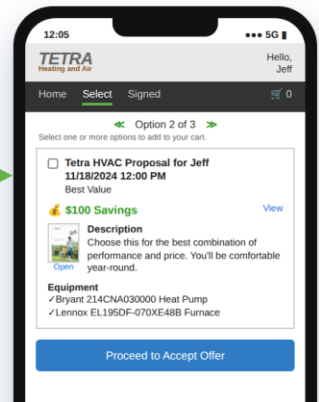
2 WHEN



View alert lands in your inbox with the number already in it. The call is one tap away.

Daily report and view alerts set once in Notifications

3 WHAT THEY SEE



The Hot & Cold Report tells you who to call; view notifications tell you when. The absent decision-maker (the other leg of a “one-legged” call) gets the same proposal on their own phone.

HOW SALES BUILDER PRO HELPS

The eSign Toolkit turns a think-it-over into a signed deal, and notifies you the moment the proposal is viewed.

The Hot & Cold Report (Yes. This is an HVAC pun.) Top reps log in to Sales Builder Pro and get their prioritized call list before their first coffee.

Deal Manager (on the app and in the office) filters pending deals by 2-day, 7-day, and 30-day age with one tap.

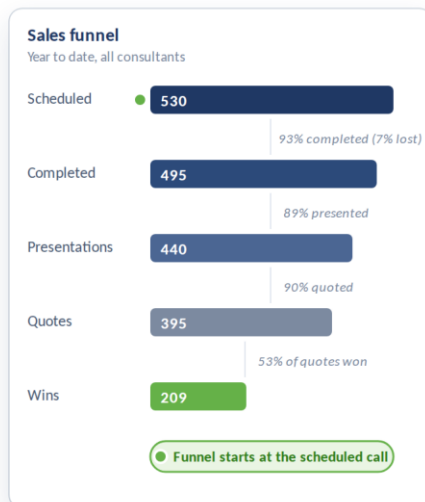
Keep Score

Sales Builder Pro tracks scheduled and completed calls, presentations, quotes, and win rates. Decide deliberately where your funnel starts. Most contractors measure from the scheduled call, since that is where the investment begins. Compare consultants, compare periods, and let the numbers coach. When lead qualification drifts (too many uncompleted calls), fix the marketing qualification process. When close rates drift, view timelines or ride along and discuss the nine steps of the process. What has changed? What needs to change? The companies that keep score are the companies that improve.

“What gets measured gets managed.”

KEEP SCORE Let the numbers coach.

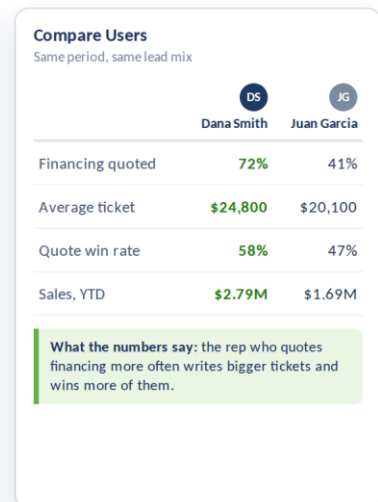
1 WIN RATES



2 PERIODS



3 CONSULTANTS



Marketing rendering with illustrative figures, not an actual Sales Builder Pro screenshot.

Compare consultants, periods, and win rates. The companies that keep score are the companies that improve.

HOW SALES BUILDER PRO HELPS

Dashboards and funnels track calls, presentations, quotes, and wins by week, month, quarter, and year, with prior-period comparisons and won/lost reporting.

Compare Users and Build a Chart show which behaviors win: one owner discovered his rep who quoted financing more often had higher tickets, higher sales, and higher commissions, and used the data to convince the other rep.

Win at the Kitchen Table

Everything in this guide points at one moment: the family at their own table, choosing your company while you are still in the home. When you win there, you have blocked out the competition and saved everyone time, your customer included, and the quote did not come home with you. The process gets you to the table prepared. Sales Builder Pro makes every step faster, clearer, and more profitable.

"Sales Builder Pro was the #1 best decision I ever made."

An owner, after 35 years.
With a profitable exit 5 years later*

"My only regret was not starting sooner."

An owner and sales manager*

"Getting this app was like getting a pay raise."

A Comfort Consultant*

"We look and act more professional. More jobs are done right the first time. I can see it on the bottom line."

An Owner*

*References available

Schedule a demo today.

Find out if Sales Builder Pro is right for you.

imobilesupport.com



Sales Builder Pro is the in-home sales app from Intelligent Mobile Support. It brings presentations, ductless design tools, proposals, surveys, financing, eSign, and follow-up into one purpose-built tool for residential HVAC and other home services.



Win at the kitchen table.

Contractors sell equipment. Homeowners buy comfort.

Schedule a Demo Today.



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