

Paloma

Highly Successful Paloma Sales Techniques Tutorial



Program Overview, Steps in Selling, and Follow Up

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It is important to remember that the sales process we are suggesting should be **a consultative process rather than a hard sell**. Don't force your customer to buy something they don't need or regret buying later. The process should help move the sale forward in a series of steps that help both the seller and buyer. You will be collecting information and the buyer will be assured that you are listening to their needs. The process comes down to these basic ideas: qualify the customer, need identification, presenting the Paloma Tankless Water Heater product benefits and features based on customer needs, handling objections, closing the sale and then a post-sale follow up.

Overview


A qualified prospect is someone who has the time to implement the solution, the budget to make the purchase, the need that can be solved by the solution, the desire to continue in the sales process, and the decision-making authority to approve the purchase. **In a situation where you are speaking to both the husband and the wife, be sure to direct your questions and answers to include both.** Too often salespeople will only direct their sales pitch to the man of the house and doing so leads to a lost sale when they have left the other partner out of the process.

Step 1 Sales Tool - Features, Benefits, and Tank vs. Tankless

Found in “Features and Sizing” section.

Paloma

Outperforming your expectations.



US Department of Energy test shows Paloma Tankless units use nearly 30% less energy than the better new 50-gallon heaters on the market and up to 40% less than the 100-gallon models.

ICAD detects flame conditions that produce carbon monoxide, the unit shuts down and the controller displays an error code.

Digital Remotes let you set and change water temperature from different locations in your home.

With DUOnex™ and the DUOnex™ Cable you can create a two-unit system with double the performance.

Features, Benefits and Tank vs. Tankless

When you care about premium features and premium technology - Paloma provides it all.

Paloma Tankless water heaters deliver more than the basics. They help you reduce your impact on the environment, ensure the safety of your family, provide convenience and durability, and they do it all while showering you with the luxury you deserve.

Eco-Centered

The Paloma Tankless ensures the efficient use of energy resources in water heating. With simple maintenance, you can further reduce the lifecycle carbon impact of a Paloma Tankless by maintaining it. And it will last longer than a conventional storage-tank water heater.

Lower Cost of Operation

That hot water tank you have in the basement keeping water hot 24 hours a day, 7 days a week 365 days a year, even when you're away during day or on summer vacation or a business trip. So how can you match energy use with your lifestyle? A Paloma Tankless heats water only when you need hot water. The Paloma Tankless provide you with lower operating costs.


How much lower? That depends on how you use hot water. The US Department of Energy tests simulated use, which is known as the Energy Factor. It shows that the Paloma Tankless units use nearly 30% less energy than the better new 50-gallon heater on the market and up to 40% less than the 100-gallon models.

Carbon Monoxide Protection

Paloma Digital Tankless indoor models' ICAD™ (Incomplete Combustion Avoidance Device) is a sophisticated system that monitors and optimizes

With one-unit systems be sure to point out Morning Shower Hour performance, monthly savings when the prospect only uses gas when they need hot water, matching actual usage.





DUOnex™ Easy Expansion



DUOnex™ gives you the capability to create a 2-unit system by simply connecting the two units together with a Paloma DUOnex™ Cable.

With DUOnex™, the Paloma residential series can be expanded in four steps from just 141,000 BTUs with a 5.3 Series unit operating by itself in SOLO Mode up to 399,800 BTUs with the 7.4 Series in DUO Mode.

Tank vs. Tankless Comparison Chart


VS.




	50-Gallon Tank	199,900 BTU	180,000 BTU	141,000 BTU
Performance Standards				
Department of Energy Energy Factor	0.58 - 0.65	0.82	0.82	0.82
"First Hour" Hot Water	65 - 92 gallons	258 gallons	240 gallons	180 gallons
Morning Shower Hour				
Shower After Shower After Shower				
2 Simultaneous 10-minute Showers				
2 Simultaneous 20-minute Showers				
3 Simultaneous 10-minute Showers				
3 Simultaneous 20-minute Showers				
Bath Time				
Fill 60-gallon tub				
Take a Shower Immediately After				
Fill 140-Gallon Whirlpool Tub				
Multiple Applications				
Dishwasher + Washing Machine + Dishwashing				
Dishwasher + Washing Machine				
Shower + Dishwasher				
Environmental Impact				
Constant Use of Gas				
Uses Gas Only When You Need it				
Compact Design				
12-Year Limited Warranty	Optional	Standard	Standard	Standard

With two-unit systems be sure to point out Morning Shower Hour performance, Multiple Application performance, and the even greater energy efficiency of using gas only when they need hot water.

* Performance in the Southern Coastal Regions during extreme winter months with 60 degree F inlet water.

Step 2

In this stage, take your qualified prospect through a series of questions and answers in order to identify the requirements of the prospect. During this step, help the buyer identify and quantify a need or a “gap” between where the client is today and where they would like to be in the future. Based on that gap, needs can be clarified to determine if the solution will fill all or part of the overall gap. This is where good listening skills come into play. For instance, you may be speaking to a family that has a busy schedule during the morning hours and not an adequate amount of hot water. The last one in the shower may be getting a cold one. Explain to them how the Paloma will give them plenty of hot water shower after shower after shower.

From this procedure you are able to come up with a proposal suggesting various products/services that will meet the needs as presented by the prospect. Present the features and benefits based on what you have learned from the prospect and don’t waste their time giving them information they did not ask for or show any interest in.

Step 2 Sales Tool - Tankless Sizing Guide

Found in “Features and Sizing” section.

Your guide to selecting Paloma Tankless Water Heaters.

Welcome to the new world of Paloma Tankless energy-efficient water heating. Answer some simple questions to help match the model that is right for your peak hot water usage and lifestyle.

Question	Answer
1. How many bathrooms do you have in your house?	3
2. Where do you live?	North
3. Would you like to be able to take simultaneous showers?	Yes
4. If you answered yes, how many?	3
5. Do you have a multi-head shower system?	Yes, 8gpm
6. Do you have a whirlpool bath?	Yes
7. Besides your shower, are there any other hot water applications you would like to run simultaneously?	Dishwasher & Laundry

Once you've answered the questions, take your answer from Question 1 and with your contractor, match it to one or more Paloma Tankless solutions as your starting point. You can make your final selection using questions 2 thru 7.

If your local water temperature falls below 60 degrees F in the winter, consider yourself in the Northern Climate zone.

Each answer will move you to a different section of the chart and help find the optimal solution for your client.

	6.4 SERIES	9.5 SERIES	6.4 SERIES	9.5 SERIES
Question 1: 3 Baths	1 - 2 Bath Homes	2 - 3 Bath Homes	2 - 3 Bath Homes	Multi-head Shower or 3 or more Bath Homes
Question 2: North	Unlimited Consecutive Showers	2 Simultaneous Showers	2 Simultaneous Showers	2 Simultaneous Showers
Question 3: 3 Simultaneous showers	2 Simultaneous Showers	3 Simultaneous Showers	3 Simultaneous Showers	5 Simultaneous Showers
Question 4: Multi-head Shower System	Maximum 3.6 gpm	Maximum 5.2 gpm	Maximum 7.2 gpm	Maximum 10.3 gpm
Question 5: Multi-head shower at 8 gpm	Maximum 5.3 gpm	Maximum 7.4 gpm	Maximum 10.5 gpm	Maximum 14.8 gpm
Question 6: Whirlpool	and shower immediately after	and shower immediately after	and shower immediately after	and shower immediately after
Question 7: Simultaneous multiple application performance	Shower, Sink, Dishwasher, Laundry	Shower, Dishwasher, Sink, Laundry	Shower, Dishwasher, Sink, Laundry	Shower, Dishwasher, Sink, Laundry


Step 3 Sales Tool - Tankless Order Sheet

Found in "Sales" section. Need more? Print from a PDF found on your disc.

After the needs identification, you will create a proposal that attempts to fill the needs as expressed by the buyer.

A proper proposal will educate the prospective client about the full nature of his or her need. Often, a prospective client may be aware of only a portion of the need they expressed during needs identification. Hopefully, the proposal persuades the prospect your solution has the ability to deliver what he or she needs. The proposal should also provide justification, timelines, and costs for the entire portion of the prospect's commitment, and in terms that are useful and understandable to the client.

Step 3












(Sample)


To customize, place
Avery Label 8663



Print and place an Avery
label with your information

Today's Date	Time	Requested Installation Date	Requested Installation Time
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Customer Information Contact Name(s) Delivery Address Daytime Phone	Title Closest Cross Street Evening Phone	Company Name City E-mail	Type of Business State Zip
---	--	--	--

7.4 SERIES  Indoor <input type="checkbox"/> Nat. PH-28R IFSN <input type="checkbox"/> LP PH-28R IFSP	Outdoor  <input type="checkbox"/> Nat. PH-28R OFN <input type="checkbox"/> LP PH-28R OFP	Direct Vent  <input type="checkbox"/> Nat. PH-28R DVSN <input type="checkbox"/> LP PH-28R DVSP
5.3 SERIES  Indoor <input type="checkbox"/> Nat. PH-20R IFSN <input type="checkbox"/> LP PH-20R IFSP	Outdoor  <input type="checkbox"/> Nat. PH-20R OFN <input type="checkbox"/> LP PH-20R OFP	Direct Vent  <input type="checkbox"/> Nat. PH-20R DVSN <input type="checkbox"/> LP PH-20R DVSP
28c SERIES  Indoor <input type="checkbox"/> Nat. PH-20R IFSN <input type="checkbox"/> LP PH-20R IFSP	Outdoor  <input type="checkbox"/> Nat. PH-20R OFN <input type="checkbox"/> LP PH-20R OFP	Direct Vent  <input type="checkbox"/> Nat. PH-20R DVSN <input type="checkbox"/> LP PH-20R DVSP

 DUOnex™ Duo	<input type="checkbox"/> Yes <input type="checkbox"/> No	Plumbing If "No," install additional expansion plumbing now! <input type="checkbox"/> Yes <input type="checkbox"/> No	Additional Unit Unit Model Number DUOnex™ Cable <input type="checkbox"/> Yes <input type="checkbox"/> No
--	---	--	--

MULTI-ready 	<input type="checkbox"/> Yes <input type="checkbox"/> No	Plumbing If "No," install additional expansion plumbing now! <input type="checkbox"/> Yes <input type="checkbox"/> No	Additional Unit(s) Unit Model Number Unit Model Quantity Convector  MIC-180 2-6 Units <input type="checkbox"/> MIC-180 Expansion Board 7 - 20 Units Cable Length 16 ft. 32 ft. 65 ft. Cable QTY _____
--	---	--	---

Customer contact
information for follow-up

Check boxes and circle
options for a list of items
to order

Additional Remote Controllers

First Bath Controller
☐ USC1-117
 Cable Length _____

Second Bath Controller
☐ USC1-117
 Cable Length _____

Cable Length Installation Diagram

Indoor Model Lengths

Number of 90° elbows (bends)	Max. Length of Straight Pipe
1	47' 6"
2	42' 6"
3	37' 6"

Direct Vent Model Venting Lengths

Number of 90° elbows (bends)	Max. Length of Straight Pipe
1	47' 6"
2	42' 6"
3	37' 6"

*Note: All models require Category III stainless-steel venting.

Venting Installation Diagram

3/4" Gas Line

Gas Line Installation Diagram

Ordering additional remotes? Use the diagram space for proper cable length.

Indoor or Direct Vent? Sketch the venting requirements with measurements for proper vent lengths when ordering.

Need to install a 3/4" gas line? Lots of room to diagram a pipe run from the gas meter.

Step 4 Sales Tool - Tax Credit Certification

Found in "Sales" section. Need more? Print from a PDF found on your disc.

Overcoming objections will utilize all of your product knowledge and sales skills. If there is a situation where the prospect has difficulty justifying the price, remind the prospect of the many monetary rewards that are immediately available such as the local utility rebate and the long-term savings in energy costs. Explain that a Paloma uses energy when needed and does not burn gas when the prospect is not at home. There are many of these product benefits.

Paloma®

MANUFACTURER'S CERTIFICATION STATEMENT FOR QUALIFIED ENERGY PROPERTY

2011 Changes to Federal Tax Credits Available for Qualifying Residential Systems

Federal tax credits on qualifying, high-efficiency HAVC & Water Heating equipment have been modified and extended through December 31, 2011 by the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act 2010. The program differs from the program effective in 2009-2010 in the following way:

- The maximum amount an eligible homeowner may receive in tax credit for purchasing qualifying products, whether those purchases are in the form of upgraded insulation, windows, HVAC equipment or other eligible improvements, will be reduced from \$1,500 to \$500.
- The \$500 cap is reduced by the total amount of residential energy property credits a homeowner has claimed for purchases between 2006 and 2010. If you have already claimed credits of \$500 or more from improvements made prior to 2011, you will be unable to claim new credits for improvements made during 2011.
- The credit is no longer 30% of qualified residential energy property costs (including labor), but is now equal to an amount not to exceed.

Maximum Available Tax Credit	Product Type	Efficiency Requirements
\$300	Gas Water Heater	EF \geq 0.82 or TE \geq 0.90

IMPORTANT NOTICE:

This information is provided to assist in identifying applicable tax credits on Paloma products, and should not be considered tax advice. Consult your tax professional to receive your particular circumstances.

Page 1 of 2

Give one copy to every customer you install a Paloma Tankless for.

Where your customers
can get more information
on their tax credit.

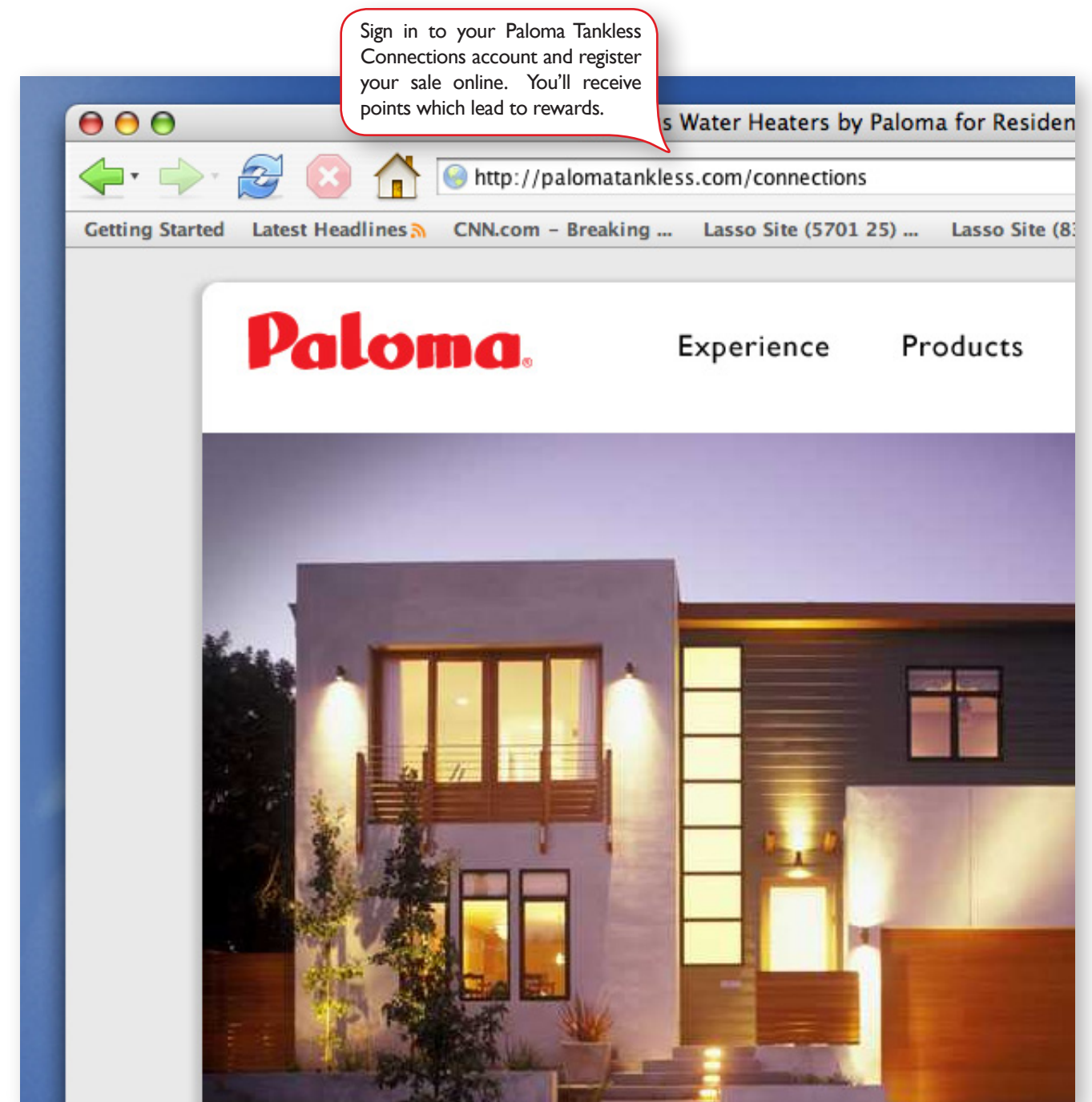
Step 4

Step 5 Sales Tool - Paloma Tankless Connections

Found online at www.palomatankless.com/connections

The Closing is the final step, and may be an exchange of money or acquiring a signature. The term is usually distinguished from ordinary practices such as explaining a product's benefits or justifying an expense. If, at this point, it is not possible to close the sale, go back over the process of presenting the benefits based on needs with the prospect to see if something was left out or a new concern was uncovered during the process. Then take them through the steps again.

Step 5



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Follow Up After the Sale

The salesperson must carry out a number of important processes after each sale.

All relevant paperwork must be completed with copies provided to the client, confirming the order and detailing the installation or delivery dates.

Sales reports usually have to be filled out, specifying the product type and quantity and other specific details required.

The salesperson must follow up with the client, contacting them regularly to make sure that they are pleased with the progress of the order. Resolve any issues or problems that may arise. Be sure that the clients' expectations are clear. When is the best time to do this? Upon delivery, just to make sure everything's fine. Follow-up and problem resolution are important indicators of integrity. A salesperson is personally endorsing the product/services and must ensure customer satisfaction.

Be your client's best advocate, even if a well-organized customer service department exists in your organization for after-sales care.

The second reason to follow up, the second follow-up, is to get referrals. When is the best time to do this? Within 30 days after delivery. This time, in marketing circles, is called The Time of Supreme Customer Satisfaction. You show up and say something like:

1. "How are you enjoying your new Paloma Tankless Hot Water Heater?"

2. “If you were me, who would you call on next?” Often, they’ll tell you about a friend who had admired their new Paloma.

Clients hold the salesperson responsible for what happens after the sale. Conscientious salespeople who provide excellent customer service will be rewarded with referrals from satisfied clients. On a similar subject, studies have shown, over and over again, that the more contact time you spend with customers, the more loyalty they will have for you and your services. We're not talking about building friendships; we're talking about more contact time for business relationships.

Follow Up After the Sale Sales Tool - Customer Tracking Sheet

Found in "Sales" section. Need more? Print from a PDF found on your disc.

Paloma®

Customer Tracking Sheet

(Sample)

To customize, place
Avery Label 8663

Customer Information	Contact Name(s)		Title	Company Name	Type
	Delivery Address	Closest Cross Street		City	State
	Daytime Phone	Evening Phone		E-mail	

Copy the Customer's
Information from the
Tankless Order Sheet.

Customer Follow Up	Date	Notes	Date to Follow Up	Method of Follow Up

Keep track of client
contact and schedule
times to follow up.

Follow Up

Five methods for effective follow-up with existing and potential customers.

1. Thank-you notes

Following the initial appointment with a potential customer, a thank-you note should be sent out immediately, regardless of whether a sale was completed or not. If possible, handwritten notes personalized for each customer will make the greatest impression. Always include a business card, even if one was left at the house.

2. Follow-up calls

Don't call back right away, and give prospects the choice to call your dealership with any follow-up concerns or questions. Wait at least one month before contacting the existing customer. Making this first move and reaching out to the customer can actually strengthen your credibility.

3. Surveys, e-mails and mailed brochures

Rather than a call or hand-written note, send unobtrusive e-mails to customers. Conducting an e-mail or mail survey following up on the customer's experience with the salesperson and dealership overall can also be very beneficial and eye-opening for you. Every few months, insert a brochure with the bill for extended warranties or other products and services.

4. Installation check-ups

Once a system is installed, offer a basic system inspection one year from the month the Paloma was initially installed. There's rarely a problem with the Paloma products but make sure that everything is working properly and keep up on any necessary maintenance.

5. Referral incentives

Many plumbers gain a good portion of their business from referrals. One way you can obtain these referrals is by motivating existing customers to provide recommendations using an incentive program. For example, you might reward your customers with a gift certificate to a local department store when they provide a referral to a potential customer.

You will find that the disciplined use of customer follow-up will pay off by creating a loyal customer base that will send you referrals and repeat business.

Follow-up Tips

Follow Up After the Sale Sales Tool - Mail Materials

Print from a PDF found on your disc.

Thank You
For Being
Tankless



Thank-you Postcard

Direct Response Postcard



PALOMA TANKLESS HOT WATER MATCHED TO YOUR LIFESTYLE



Living in your
basement, spending
your money when
you are away!

Envelope Stuffer

GreetingFrom...



Direct Response Postcard



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