

## Upselling At the HVAC Counter - Timing is Everything

By Steve Coscia

On a recent business trip to speak at an Ohio HVAC association meeting, I drove across Pennsylvania on the PA Turnpike. I departed my home early in the morning, at about 4:30 am, in hopes of making it to Akron, Ohio by noon.

During my first rest stop, on the Pennsylvania Turnpike, I decided to buy a fresh cup of coffee. The woman who worked the food counter had a great sense of energy and enthusiasm – she was obviously a morning person.

Customers were greeted with a smile and a pleasant invitation, “How may I help you?” The pervasive aroma of brewing coffee, fresh-baked pastries, sizzling bacon and fried eggs filled the room and created an appetizing ambiance.

When it was my turn I ordered my coffee, pulled a five dollar bill out of my wallet and as I handed over the money to the woman, she asked, “Would you like a breakfast sandwich - they’re fresh?” So there I stood cash in hand, in the presence of an upbeat person who invited me to taste the food which filled the room with its enticing aroma. A positive response added \$2.50 to my total.

After she handed me the coffee and breakfast sandwich, along with a nice “thank you,” I stepped to the side to add a little milk to



my coffee. I overheard the next transaction in which a customer ordered a cup of coffee and sure enough, this woman made the same suggestion which resulted in another breakfast sandwich sale. This added another \$2.50 to her cash register.

Being curious, I waited in the lobby, ate my breakfast sandwich, and watched this counter person serve more customers. She sold an additional four breakfast sandwiches in about five minutes. This woman’s sense of timing was outstanding. She waited until a customer’s wallet or purse was out, with cash in hand and then she asked her upselling question along with the value proposition, “They’re fresh.”

Wow, I thought – that’s an additional \$10.00 every five minutes which could translate into \$120.00 an hour. As I walked back to my car, I remarked to myself that this woman understood how to upsell.

For many HVAC counter professionals upselling is one of the least understood business

behaviors, which can have a most dramatic impact on revenue and profitability.

So if up-selling is such a great business practice, why don’t more companies do it?

Perhaps the answer lies in the fact that upselling is a behavior that needs to be trained - this requires scripted upselling suggestions to customers and it also requires a stable infrastructure and good organization to maximize the upselling possibilities.

HVAC counter professionals who suggest an electrical whip, disconnect or line set each time a contractor ordered a three ton condensing unit supersize their orders. These numbers add up to significant revenue.

If we were to define exactly what upselling is the definition would go like this: upselling is offering a suggestion to an already receptive buyer to enhance the value of his or her purchase. Upselling does not include aggressive selling tactics.

The purpose of HVAC counter upselling is to build a mutual benefit so that both you and the customer win. Upselling assumes that you have already made the sale - now don’t lose it.

There exists in upselling the opportunity to lose a sale if

a salesperson becomes too aggressive, upsets the buyer or does something else to break the continuity of the customer's buying experience.

Therefore, it is vital that HVAC counter professionals understand the true nature of what is upselling.

As demonstrated by the woman at the rest stop, timing is an important element in upselling.

Wait until the customer's wallet is out, their guard is relaxed, and the business rapport is high.

When these factors are not favorable the success of upselling is limited. In the same way that he who has the most time sensitive pressure does worse in a sales or negotiating scenario – the same thing applies to upselling.

In up-selling — timing is everything.

*About the author:*

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## Customer Profile

*Do you recognize any of these customers?*



Airconditioning and refrigeration customers are a diverse customer group.

There's the father and son operation – two guys and a van, with someone's wife keeping the books.

There is the second-generation firm that the owner indicates she wants to go from just "self-employed" to a true business entrepreneur. Next, there is the established contractor still a close corporation (family owns the business), but has a small fleet of vans, has depart-

ment managers and is involved in the local contractor association.

And, of course, the very large contractor – gets his name in the paper from time to time because of community involvement and because of the high profile jobs he's working on.

A University of Chicago Business School survey indicated that a contractor may buy from up to 7 different distributors. About half the time the contractor or his employee makes purchases in person followed by using the phone, fax and internet.

Each of these customer classes needs different support services from the distributor. And each class can result in a prof-

itable business relationship. Size is not necessarily the issue.

A not so good customer (of any size) might be described as follows

- Cherry picks by price shopping
- Lots of small orders
- Returns a lot of stuff
- Too many rush orders
- Slow pay

Every service offered by your company may not be needed – or paid for – by individual customers. The responsibility of the sales team is to uncover each customer's "business peeve" and offer a service that resolves the problem. Being known for your help and for being "easy to do business with" is a positive way to grow business.

## *Selling the Consumer –*

### *Your Customers Can Learn Sales Training for Free!*

As a contribution to help improve retail selling skills, HARDI distributors are offering free basic sales training lessons to interested dealers and technicians via the HARDI website. Fourteen topics on the “ABCs of Selling HVAC to the Consumer” are posted on [www.hardinet.org](http://www.hardinet.org).



These lessons address basic selling principles and are

not intended as a substitute for selling seminars conducted by our industry sales consultants. If anything, these lessons could be viewed as a prelude to attending more intense, role-playing sales schools.

The lessons are written specifically for the face-to-face homeowner sales call. Such traditional topics as designing a sales proposal, using the telephone, ways to overcome objections and simply how to plan a successful sales call are all included in the 14 basic lessons.

Your customers can download the lessons at [www.hardinet.org](http://www.hardinet.org), by clicking on

the Home Study Institute, then Dealer Sales sign in and entering the following user name: Yourwholesaler (one word) and the password provides. The lessons can be studied in any order.

For the dedicated individual who wishes to verify his/her understanding of the material, the association's Home Study Institute will provide an optional test for an administrative fee of \$25. Following grading by the Institute, a Certificate of Completion will be issued as proof of the undertaking and a successful examination.

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## **Some Useful Training & Testing Resources**

### ***NATE Certification Training Resources***

Refrigeration Service Engineers Society:  
[www.hvacrtrainingauthority.org](http://www.hvacrtrainingauthority.org)

Exam Guide –  
[www.palpublications.com](http://www.palpublications.com)

On Line Learning –  
[www.hvacrededucation.net](http://www.hvacrededucation.net)

### ***Certification Tests:***

**EPA • ICE • NATE • Oil Heat**

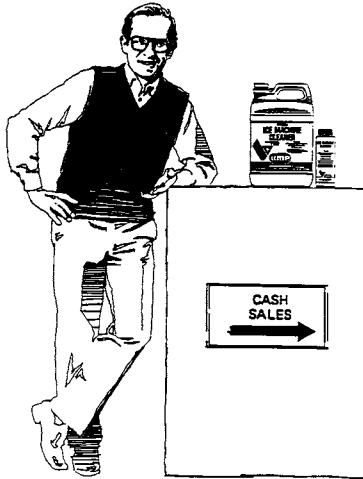
Esco Institute:  
[www.escoinst.com/Certification.htm](http://www.escoinst.com/Certification.htm)

Video General – [www.vgitraining.com](http://www.vgitraining.com)

Air Conditioning & Refrigeration Institute:  
[www.ari.org/edu/techcert.html](http://www.ari.org/edu/techcert.html)  
[www.ari.org/edu/ice.html](http://www.ari.org/edu/ice.html)

North American Technician Excellence:  
[www.NATEx.org](http://www.NATEx.org)

NORA (oil heat certification):  
[www.noraed.org](http://www.noraed.org)



## Counter Tips *by Wirtz*

### On Handling Refrigerants

Some customers are often careless; others may simply be “green” and be unaware. But, the handling and storage of fluorinated refrigerants is considered dangerous enough so that the U. S. Department of Transportation (DOT) prescribes how much refrigerant can be loaded into containers and also specifies working and test pressures for these containers. Also, the Clean Air Act forbids venting of refrigerants to the atmosphere.

Here are some safety tips:

1. Wear safety goggles and gloves for personal protection whenever handling refrigerant cylinders, transferring or charging refrigerants.
2. Don't tamper with fusible plugs, relief valves or discs in cylinders. They are designed to release excessive internal pressure.

3. Never apply a direct flame to a refrigerant cylinder. This can cause chemical decomposition of the refrigerant, weaken cylinders and raise internal pressure beyond safe limits.

4. Never warm a cylinder above 125° F even using “accepted” and well controlled heaters, blankets, etc.

5. Always “crack” a service valve open gradually to assure positive control of gas flow.

6. Don't interchange refrigerants. Cylinders are color coded; White is R-12, Green is R-22, Red top or band is R-500, Orchid is R-502, and R-410A is Rose.

7. Liquid refrigerant can cause “frost bites.” Wash your hands immediately upon contact. If eyes are contaminated, wash with mineral oil if possible (except for ammonia gas); then use a boric acid solution. (Note No. 1 rule – above.)

8. Refrigerant vapors are dense (heavy). They can collect in low spots and could

cause asphyxiation (lack of oxygen) in sufficient quantities and in poorly ventilated space. Avoid inhalation of concentrated vapors.

9. Refrigerant vapors exposed to air, open flame or hot surfaces and water may decompose into more toxic products.

10. Before loosening any valves, bolts, screws, etc. holding parts in place, see that pressure or vacuum differences are relieved.

11. Properly dispose of throw-away refrigerant cans and cylinders. Do not use them for any purpose. Do not use old refillable cylinders if date stamp on shoulder is more than five years old.

12. Go easy on muscle power and don't do anything in a hurry.

*Got Questions? E-mail your technical questions to: [rwirtz@hardinet.org](mailto:rwirtz@hardinet.org). HARDI Associate Director of Education Richard Wirtz is Professor Emeritus, Columbus State Community College, NATE certified, a CMS, test proctor and trainer.*