

HTR WINDOWS AND DOORS

The Anatomy of a Winning Appointment

A step-by-step in-home sales simulation — 5 windows, from the doorbell to the signature

Sales Rep Training · ABC of Window Sales series · For internal use only

How to read this guide. The left column is the appointment as it actually plays out — what Alex *does* and *says*. The red box after each move is the coaching: the technique, and why it works. Learn the *why*, not just the script — customers can smell a memorized pitch, but they trust a rep who understands them.

The scenario

Rep	Alex — HTR Windows and Doors
Customers	Mark (husband) & Mary (wife) — both home
The job	5 windows, supply + install. Old units are drafty, foggy, hard to open
Location	Kelowna, BC (so the CleanBC Better Homes rebate applies — see Stage 5)
Their mindset	Mary is emotionally ready. Mark is the brake — price-focused, "just getting quotes"
Target outcome	Signed contract + deposit tonight, both spouses comfortable

Know the room before you knock

Almost every two-person household has a **Mary** (moves toward how it will look and feel) and a **Mark** (moves toward numbers, value, "let's not rush"). You are not selling to one person — you are getting *two different people* to say yes for two different reasons. Sell comfort and looks to Mary; sell value, bills, and warranty to Mark. Lose either one and you lose the deal.

STAGE 0 · In the truck — win it before the bell

Alex parks, and before he touches the door he spends three minutes:

- Re-reads the lead sheet — confirms names (Mark & Mary), the "5 windows," and what the lead said the problem was.
- Checks the kit: tablet/quoting device charged, cutaway window sample, glass sample, brochure, financing figures, the rebate one-pager, and the contract ready to sign.
- Sets his head straight: "I am a consultant who solves a cold, foggy, ugly-window problem — not a guy begging to sell glass."

WHY THIS WORKS Confidence is preparation, not personality. A rep who fumbles for a charger or forgets the wife's name has already told the customer "I'm disorganized — don't trust me with a \$14,000 job." The sale is largely decided before the door opens.

STAGE 1 · The approach — the doorbell

[Alex rings, then takes one step back from the door and stands slightly to the side. Smiles.]

Alex: Hi there — you must be Mark? Alex, from HTR Windows and Doors. We spoke Tuesday about the five windows. Is Mary around too?

Mark: Yeah, she's inside.

Alex: Perfect — I always like to have you both, because the best decisions get made when you're both in on it. Mind if I come in?

WHY THIS WORKS **Step back from the door.** Standing right on the threshold reads as pushy. One step back signals "no pressure" before you've said a word.

- **Confirm BOTH decision-makers immediately.** If Mary is "out until later," you have a decision: reschedule, or you'll spend two hours pitching a person who can only say "I need to talk to my wife." A one-legged appointment is the #1 self-inflicted lost deal.

STAGE 2 · Entry — take command of the room, gently

[Alex wipes his feet at the door and offers to take his shoes off. Mary appears.]

Alex: You must be Mary — nice to meet you. Should I leave my shoes here?

Mary: Oh, you're fine. Come on in.

Alex: Beautiful place. How long have you two been here?

[Small genuine rapport — 60 seconds, not ten minutes. Then Alex steers the seating.]

Alex: Where's the best spot to spread out for a few minutes — the kitchen table? And do you mind if we hit pause on the TV, just so I've got both of you for the next little bit?

WHY THIS WORKS **Respect the home.** Shoes and wiped feet in a Canadian home = instant respect points. Little things telegraph how you'll treat their house on install day.

- **Kitchen table beats the couch — every time.** You need a flat surface for the tablet and the contract, and you need Mark and Mary side by side, not you pitching across a coffee table at a running TV. Turning the TV off politely is taking control without taking over.
- **Keep rapport short.** Rapport opens the door; it doesn't close the deal. Two minutes of genuine warmth, then move to work — over-chatting makes you look like you're stalling.

STAGE 3 · The upfront agreement — earn the right to a decision

Alex: Here's how I'll use your time so there are no surprises. First, I want to understand what's actually bugging you about these windows and what "fixed" looks like to you. Then I'll show you exactly what we install and why it's different. I'll measure everything, and before I leave you'll have an exact price — to the penny, including any rebate you qualify for — so you two can make a decision tonight. If it's a fit, great; if it's not, that's completely fine too. Sound fair?

Mark: Yeah, that works.

WHY THIS WORKS This is the single most important minute of the appointment. By agreeing up front that a decision tonight is the goal, Mark and Mary just gave you permission to ask for the sale later — and they quietly disarmed their own "we'll think about it." You also lowered the pressure by giving them an honest out ("if it's not a fit, that's fine"), which paradoxically makes them more open. This is the "A" in ABC: you Assume the close from minute one, out loud, with their buy-in.

STAGE 4 · Discovery — ask, then shut up and listen

Alex asks, writes down their exact words, and lets each spouse talk to their own driver.

Alex: What made you pick up the phone about this now — why this year and not next?

Mary: Honestly, the master bedroom is freezing every winter. We run a space heater half the year and there's condensation on the glass every morning.

Alex: That sounds miserable. Show me — which ones bug you the most?

[They walk to the windows together. Alex feels the draft, notes the fog between the panes, tries a stiff sash.]

Alex: Yeah — feel that? That's cold air pouring past a failed seal. And the fog between the glass means the sealed unit's gone. Mark, what's a rough winter hydro bill for you two?

Mark: Too much. Couple hundred a month in the cold months, easy.

Alex: If we could wave a wand — what does "done right" look like a year from now?

Mary: Warm bedroom, no space heater, and honestly they'd actually look nice from the street.

Alex: Got it. Any date you're hoping to have this finished by? And besides the two of you, is anyone else weighing in on the decision?

Mark: No, just us. Before the winter would be ideal.

Alex: Last thing — have you set a rough budget for this, or is that part of what you want me to help you figure out tonight?

WHY THIS WORKS You just qualified everything without interrogating. Inside a natural conversation you confirmed the pain (cold room, fog, bills), the urgency (before winter), the decision-makers (just them), and the money frame. That's the whole qualification — wrapped in problem-solving language.

- **Write their exact words.** Mary said "warm bedroom, no space heater, look nice from the street." Mark said "couple hundred a month." You will sell those exact phrases back to them at price time. Their words close the deal, not yours.

- **Amplify the pain before you ever mention price.** "How does it feel to fight your own house every winter?" People buy to escape a pain or reach a pleasure. If the problem doesn't hurt out loud, no price will ever feel cheap enough.

STAGE 5 · Qualify rebates & financing — early, as value

Alex: Two quick things that change your number — and I'd rather you hear them now than at the end. One: your address is in BC, so these likely qualify for the CleanBC Better Homes rebate — \$100 back per window opening on energy-efficient units. Five windows, that's up to \$500 back in your pocket. Two: a lot of couples would rather keep their savings where they are and spread the investment out. Do you want me to show you both the cash price and a monthly option, so you pick what fits you?

Mary: Both, definitely.

WHY THIS WORKS Introduce rebates and financing as value, not as a rescue. Dropped in early, they say "this is smart and affordable." Pulled out at the end after a price shock, they look like desperation discounts. Frame first, price second.

- **Verify the rebate for THIS address before you quote a number.** Rebate programs differ by province and even by utility territory. CleanBC Better Homes applies in BC; an Ontario, NB, PE, NS or Alberta home is a different program (or none). Confirm the live program and the current amount before you promise a dollar figure — never quote a rebate from memory.
- **Offer both cash and monthly.** You don't yet know if Mark's brake is "it's expensive" or "we don't have \$14k sitting in the account." Offering both keeps both doors open.

STAGE 6 · The presentation — build value, feature to benefit

[Alex brings out the cutaway sample and hands it to Mary — physical touch builds ownership.]

Alex: Mary, you said drafts and a cold bedroom. Feel this — triple weatherstrip, and the sash pulls tight into the frame like a fridge door sealing shut. That's what kills the draft you feel at night.

Alex: Mark, you said hydro. This is a triple-pane, Low-E, argon-filled unit — the glass reflects your heat back inside instead of letting it leak out. Here's the NRCan / Energy Star rating, and this is exactly why it clears the bar for that CleanBC rebate we talked about.

[Alex does the side-by-side: a cheap builder-grade sample vs. the HTR unit. Lets them feel the weight and the seal difference.]

Alex: And the part nobody thinks about until it goes wrong — our own crews install these, not subcontractors. We pull the old unit, seal and insulate the opening properly, cap the outside so it's weather-tight, and we clean up. Warranty covers the unit and our labour.

Alex: Does this feel like the quality you two were hoping for?

Mary: Oh, this is way nicer than what we have.

WHY THIS WORKS Never feature-dump. Every single feature must land on a benefit THEY told you they want. "Triple weatherstrip" is nothing; "this kills the draft in your bedroom" is everything. Match feature → their exact pain.

- **Sell the hole, not the drill.** They don't want windows. They want a warm, quiet, good-looking house that's cheaper to heat. Keep painting that picture.
- **Trial-close constantly.** "Does this feel like the quality you were hoping for?" is a temperature check. A yes here means you've built enough value to talk price. A hesitation means keep building — do NOT go to price yet.

STAGE 7 · Measure & build the quote — in front of them

[Alex measures each opening, confirming choices out loud as he works.]

Alex: Mary — white frames, or were you picturing black on the exterior for that "nice from the street" look? ... Black it is. Mark, all five as the same style, or is the living room a picture window?

[Alex builds the quote on the tablet while they watch.]

WHY THIS WORKS Measuring in front of the customer is a commitment device — the moment they watch you measure and pick colours, they start picturing it done. Keep them choosing (colour, style, which room first). Every small "yes" to a choice is a rehearsal for the big yes.

STAGE 8 · Present the price — then stop talking

Alex turns the tablet around and walks the number top-down, out loud:

5 windows — supply + install, taxes, warranty, cleanup	\$14,900
Less CleanBC Better Homes rebate (5 × \$100)	– \$500
Your net investment	\$14,400
Or spread out — illustrative monthly (use your live financing calculator)	~\$275/mo

Alex: So all in, five windows fully installed, warranty, cleanup, taxes — fourteen-nine. With the rebate, your net is fourteen-four. Or about \$275 a month if you'd rather keep your cash where it is.

[Alex says the number, sets the tablet down, and goes completely silent.]

WHY THIS WORKS **Present the big number first, then shrink it.** You say \$14,900, then subtract \$500 in front of them — the number visibly drops. That's a small psychological win baked into the presentation.

- **Say the price and STOP.** The next person to speak loses. Reps lose thousands of dollars a year by nervously talking past the price — "...but we could maybe look at..." — and negotiating against themselves before the customer has said a word. Say it. Sit still. Let the silence do the work.

STAGE 9 · Negotiation — isolate before you ever discount

Mark: That's more than we were expecting. We really wanted to get a couple more quotes before deciding.

Alex: Totally fair, Mark — a lot of my customers felt exactly that way before they saw the difference in person. Let me ask you this, so I know I'm actually helping: if the other quotes came back, and this is the quality and the crew you trust — is price the only thing standing between you and getting this done before winter?

Mark: Basically, yeah. It's the number.

WHY THIS WORKS **Feel / Felt / Found, then ISOLATE.** You acknowledge ("a lot of customers felt that way") without caving. Then you isolate: is price the REAL objection, or a polite exit? Never discount until you know a discount actually wins the deal — otherwise you just lower the price and still hear "we'll think about it."

- **"Get more quotes" is usually code for "I'm not sold yet or it's too much."** Isolating turns a vague stall into a concrete, solvable objection: "it's the number."

Alex: Okay — I respect that, so I won't insult you with a fake "tonight only" gimmick. But I do have two real levers. I've got one crew slot open before winter, and if we book it now I save on scheduling and can bring your net to thirteen-nine. And if you're comfortable moving ahead tonight, I lock today's material pricing before our next supplier increase. So the question is really — does getting this off your plate tonight, warm bedroom before the snow, sound good to you both?

Mary: I mean... yes. Mark, I'm so done with that space heater.

WHY THIS WORKS Give a **REASON** for every dollar you move. A discount with no reason ("okay, I'll knock off \$500") teaches the customer your first price was fake and there's more to squeeze. A discount with a reason (open crew slot, price lock) protects your integrity and still rewards acting now.

- **Tie the concession to a decision tonight.** The lever and the "now" are one sentence. That's honest urgency — real reasons, not invented ones.
- **When one spouse turns, sell THROUGH them.** Mary just became your closer. From here Alex answers Mark but lets Mary apply the warm pressure — a spouse's nudge beats a rep's pitch every time.

If they still say "we need to think about it"

Alex: Of course — it's a real decision. When couples tell me they want to think it over, it's almost always one of three things: the product, the company, or the money. Which one's the quiet little voice for you two?

WHY THIS WORKS "We need to think about it" is not an objection — it's a hiding place. The three-option question flushes the REAL concern into the open so you can actually address it. You can't handle an objection you can't see.

STAGE 10 · The financing reframe — shrink the number

Mark: Thirteen-nine is still a lot of money up front.

Alex: It is — up front. But look at it the way you'd actually live it. On the monthly option it's about \$275. You just told me the space heater and the drafts already cost you a couple hundred a month in hydro all winter. You're not really adding a new bill — you're trading a cold one that keeps climbing for a fixed one that ends, and you get a warm, quiet, better-looking house the entire time you're paying it off.

Mark: When you put it like that...

WHY THIS WORKS Shrink the big number to a monthly bite, then anchor it against money they ALREADY spend (hydro, the space heater). Financing converts "we don't have \$14k lying around" into "we can do \$275." For a price-driven Mark, the monthly reframe is often the exact thing that unlocks the yes. Always confirm the real monthly figure on your live financing calculator — never quote a payment from memory.

STAGE 11 · The close & the contract

[Alex doesn't ask "so, do you want to buy?" He assumes it and moves to logistics.]

Alex: Let's get you set up, then. Five windows, triple-pane, black exterior, installed before winter — and we'll start with the master bedroom so you get that room fixed first. I just need a couple of signatures and a deposit to lock your crew slot and today's pricing. Mark, for the deposit — e-transfer or card?

Mark: E-transfer's fine.

WHY THIS WORKS Assume the close on a **SMALL** yes. You never ask the scary "will you buy?" You ask "which room first?" and "e-transfer or card?" A yes on a small logistics question IS the sale. This is the classic assumptive / alternative-choice close.

- **Get the deposit — a sale isn't a sale until money moves.** A signature with no deposit cancels overnight. Deposit locks commitment.

Walk the contract honestly — including the cooling-off period

Alex walks them through the contract plainly: scope and colour, the net price and how the rebate is handled, the deposit and the balance due on completion, the warranty, and the install window.

Alex: One thing I always point out — because it's your right and I'd rather you hear it from me: on an in-home purchase like this in BC you have a cancellation window after signing. I'm confident you'll be thrilled, but I want you to know it's there. Any questions before you sign?

[Mark and Mary sign. Deposit sent by e-transfer. Alex confirms the order and the next steps.]

WHY THIS WORKS Volunteering the cooling-off / cancellation right feels scary to a new rep — it isn't. In BC, in-home ("direct sales") contracts carry a statutory cancellation right, and a rep who states it confidently builds trust and gets FEWER cancellations and MORE referrals than one who hides it. Confirm the exact current terms and days with your manager and make sure they're written into the contract — never improvise legal terms.

STAGE 12 · After the signature — cement it & plant the seed

Alex: You two made a great call — that bedroom's going to feel like a different house. Here's exactly what happens next: our tech confirms final measurements, your windows go into production, and we'll book your install day before winter. You'll hear from our order desk with the schedule.

Alex: One favour — who else on the street has been complaining about their old windows? If you send someone our way and they go ahead, there's a thank-you in it for you.

[Alex leaves the brochure and two business cards, thanks them, and goes.]

WHY THIS WORKS The five minutes after signing prevent tomorrow's cancellation. Buyer's remorse is real. Reassure them they chose well, and lay out clear next steps so there are no surprises to panic about overnight.

- **Ask for the referral at peak emotion.** Right after the yes, while the good feeling is highest, is the single best moment to ask "who else do you know?" — never at the door on your way out of a cold appointment.

What Alex did right — the moves that won this deal

- **Both decision-makers present** — No one-legged appointments. Confirmed Mary was home before walking in.
- **Controlled the room** — Kitchen table, TV off, both spouses side by side.
- **Upfront agreement** — Got permission for a decision tonight in the first minute — killed "we'll think about it" before it started.
- **Qualified inside the conversation** — Pain, urgency, decision-makers, budget — without interrogating.
- **Amplified pain before price** — Made the cold bedroom and the hydro bill hurt out loud first.
- **Rebates & financing early, as value** — Framed affordability up front, not as a panic discount.
- **Feature → their exact benefit** — Sold Mary comfort and looks, Mark bills and warranty.
- **Trial-closed throughout** — Checked temperature before every next step.
- **Said the price and went silent** — Didn't negotiate against himself.
- **Isolated before discounting** — Confirmed price was the ONLY barrier before moving a dollar.
- **Gave a reason for every concession** — Crew slot + price lock — never a naked discount.
- **Sold through the turned spouse** — Let Mary apply the pressure once she was in.
- **Assumed the close on a small yes** — "Which room first? E-transfer or card?"
- **Took a deposit** — Locked the commitment.
- **Was transparent on the cooling-off right** — Built trust; fewer cancellations.
- **Asked for a referral at peak emotion** — Right after the signature.

One-page rep checklist — run this every appointment

1. IN THE TRUCK: names confirmed, kit ready, head straight.
2. DOOR: step back, confirm BOTH spouses, smile.
3. ENTRY: respect the home, kitchen table, TV off.
4. AGREEMENT: set the agenda, earn the decision tonight.
5. DISCOVER: pain, urgency, who decides, budget frame — write their exact words.
6. AMPLIFY: make the problem hurt before you price it.
7. QUALIFY: rebate for THIS address (verify live) + offer cash AND monthly.
8. PRESENT: feature → their benefit, hand them the sample, trial close.
9. MEASURE: in front of them; keep them choosing.
10. PRICE: big number → rebate → net → monthly, then STOP TALKING.
11. ISOLATE: is price the only barrier? before any discount.
12. CONCESSION: real reason + tied to tonight.
13. REFRAME: shrink to monthly, anchor to what they already pay.
14. CLOSE: assume it on a small yes; take the deposit.
15. CONTRACT: walk it honestly, state the cooling-off right.
16. AFTER: reassure, set next steps, ask for the referral.

HTR Windows and Doors — Internal Sales Training. This is a coaching illustration; dollar figures, financing payments, rebate amounts and legal/cooling-off terms must be confirmed against current programs and the live contract for each customer's province before use.