HTR WINDOWS AND DOORS

The Anatomy of a Winning Appointment

Maritimes edition — 5 windows, choosing 2-pane vs 3-pane, from the doorbell to the signature

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

How to read this guide. The indented lines are the appointment as it plays out — what Mary *does* and *says*. The red box after each move is the coaching. This edition is set in the Maritimes, so two things are different from the BC version: there is **no CleanBC** and rebates work very differently (Stage 5), and Mary lets the customer **choose double-pane or triple-pane** based on budget and need (Stage 6).

The scenario

Rep	Mary — HTR Windows and Doors
Customers	Bob (husband) & Janette (wife) — both home
The job	5 windows, supply + install. Old units are drafty, foggy, cold in winter
Location	Moncton, NB (New Brunswick — see the Maritime rebate table in Stage 5)
Their mindset	Janette wants the freezing bedrooms fixed. Bob is watching the budget — "let's not overspend"
The product choice	Double-pane (budget) vs triple-pane (best comfort) — Mary matches it to their need
Target outcome	Signed contract + deposit tonight, both spouses comfortable

Know the room before you knock

Bob and Janette are the classic pair: **Janette** moves toward comfort and how the home feels; **Bob** moves toward the number and value. You are getting two people to say yes for two different reasons. Sell warmth and quiet to Janette; sell value, bills, and the smart 2-vs-3-pane decision to Bob.

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

Mary parks and takes three minutes before touching the door:

- Re-reads the lead sheet — confirms names (Bob & Janette), "5 windows," and the stated problem (cold, foggy windows).
- Checks the kit: quoting device charged, BOTH a double-pane and a triple-pane cutaway sample, brochure, financing figures, the ENERGY STAR / rebate one-pager, contract ready.
- Sets her head straight: "I solve a cold-house problem and help them spend wisely — I am not here to push the priciest glass."

> WHY THIS WORKS Confidence is preparation, not personality. Bringing BOTH glass samples signals that you're there to advise, not upsell — and that's exactly the posture that lets you recommend triple-pane later and be believed.

STAGE 1 · The approach — the doorbell

[Mary rings, steps one pace back from the door, smiles.]

Mary: Hi — you must be Bob? Mary, from HTR Windows and Doors. We spoke about the five windows. Is Janette able to join us too?

Bob: Yeah, she's just inside.

Mary: Perfect — I always like you both here, because the best decisions get made together. May I come in?

> WHY THIS WORKS **Step back from the door.** One pace back reads as "no pressure" before you say a word.
>
> • **Confirm BOTH decision-makers first.** If Janette were out, you'd reschedule rather than pitch a person who can only say "I need to talk to my wife." The one-legged appointment is the #1 self-inflicted lost deal.

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

[Mary wipes her feet, offers to remove her shoes. Janette appears.]

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

Janette: You're fine, come on in.

Mary: Thank you. Where's the best spot to spread out for a few minutes — the kitchen table? And do you mind if we pause the TV, just so I have both of you?

> WHY THIS WORKS **Respect the home.** Wiped feet and the shoe question earn instant trust — it tells them how you'll treat the house on install day.
>
> • **Kitchen table, both spouses, TV off.** You need a flat surface for two glass samples and the contract, and both people side by side — not you pitching across a coffee table at a running TV.

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

Mary: Here's how I'll use your time so there are no surprises. First I want to understand what's bugging you about these windows. Then I'll show you two levels of glass — double-pane and triple-pane — and help you pick the right one for your home and budget. I'll measure, and before I leave you'll have an exact price so you two can make a decision tonight. If it's a fit, great; if not, that's completely fine. Fair?

Bob: That works.

WHY THIS WORKS This is the most important minute of the visit. Agreeing up front that a decision tonight is the goal quietly disarms "we'll think about it," and naming the double-vs-triple choice now frames you as an advisor helping them choose — not a closer pushing one product.

STAGE 4 · Discovery — ask, then listen

Mary: What made you look at this now — why this year and not next?

Janette: The two bedrooms upstairs are freezing all winter. There's frost on the inside of the glass some mornings.

Mary: That sounds rough. Show me — which ones are the worst?

[They walk the house. Mary feels the drafts, notes the fogged sealed units, tries a stiff sash.]

Mary: Yeah — feel that cold coming off the glass? And the fog between the panes means the seal has failed. Bob, what's a rough winter power bill for you two?

Bob: Too high. It climbs every year, honestly.

Mary: If we fixed this properly — what does a good winter look like a year from now?

Janette: Warm bedrooms, no frost, and the front of the house actually looking updated.

Mary: Got it. Any date you're hoping to be done by? And is it just the two of you on the decision?

Bob: Just us. Before winter would be ideal — but I don't want to overspend on it.

WHY THIS WORKS **You qualified everything without interrogating.** Inside a normal conversation you got the pain (cold bedrooms, frost, rising bills), the urgency (before winter), the decision-makers (just them), and the budget nerve (Bob: "don't want to overspend").

- **Write their exact words.** "Freezing bedrooms, frost, updated front of the house" and "climbs every year." You will sell those exact phrases back to them at glass-choice and price time.
- **Bob just handed you the 2-vs-3-pane bridge.** "Don't want to overspend" is your cue to present a choice, not a single expensive number — which is exactly what earns his trust.

STAGE 5 · Qualify rebates & financing — the Maritime way

This is where the Maritimes are **completely different from BC**. There is no instant point-of-sale rebate to subtract at the table. Mary is honest about how it actually works:

Mary: Two things on money. First, rebates — I want to be straight with you because a lot of salespeople aren't. Here in New Brunswick, the window rebate runs through the provincial Total Home Energy Savings Program. It's not money I hand you tonight — it works through a home energy evaluation, and it's paid to you after the work's done. If we install ENERGY STAR units, you may qualify, and we'll give you all the paperwork you need to claim it. Second, most couples would rather not drain savings, so I'll show you a monthly option too — that's usually the piece that makes this comfortable.

Bob: So the rebate isn't guaranteed off the price?

Mary: Correct — I'd never pretend it was. It's real, but you claim it through the program afterward, and the amount depends on your evaluation and what else you upgrade. What I can lock tonight is the price, the crew slot, and a monthly payment that fits.

THE MARITIME REBATE RULE Never subtract a rebate from tonight's price and never promise a dollar amount at the table. Maritime rebates are evaluation-based and paid to the homeowner AFTER the work. Over-promising a rebate that needs a pre-work energy audit the customer never books is how deals blow up later. Position it as "you may qualify — here's how it works, and we give you the paperwork." Your closing lever is FINANCING, not the rebate.

Maritime rebate cheat-sheet — verify the live program for each customer

Province	Program (who runs it)	How it works	Windows/doors incentive
New Brunswick	Total Home Energy Savings Program (NB Power · saveenergynb.ca)	Home energy evaluation first; ENERGY STAR units; complete within ~9 months; rebate paid after a final evaluation	~$30 / opening, up to ~$50 when bundled with other upgrades (confirm current)
Nova Scotia	Efficiency Nova Scotia (efficiencyns.ca)	Home Energy Assessment path (up to $5,000 across upgrades) and/or product rebates; ENERGY STAR required	Window/door rebate offered — confirm current per-opening amount with ENS
PEI	efficiencyPEI (Government of PEI)	Energy audit by an approved partner; ENERGY STAR windows/doors	~$125 / opening, up to ~$1,000 / property (confirm current)

Federal reality (all three provinces): there is no federal window rebate or tax credit for new installs in 2026 — the Canada Greener Homes Grant closed in 2024 and the Greener Homes Loan closed October 1, 2025. Do not promise federal money for windows.

Amounts and rules change and are program-sourced. Always confirm the live program, amount, and process for the customer's exact address before you say anything specific.

WHY THIS WORKS Being the honest one on rebates is a competitive weapon. Bob has probably heard another rep imply "you'll get thousands back." When Mary levels with them — "it's real, but you claim it after, through an evaluation" — she becomes the trustworthy one in the room, and trust closes deals that fake rebate math never will.

STAGE 6 · Present & choose — double-pane vs triple-pane

[Mary sets both cutaway samples on the table — double on the left, triple on the right.]

Mary: Let's get the glass right for how you actually live, because that's where your money goes. You've got two levels.

Mary: This is double-pane — two panes, a Low-E coating, argon gas between. It's a big jump over what you have now: warmer, quieter, and it's the easier number. For a lot of homes it's plenty.

Mary: This is triple-pane — a third pane and a second Low-E coating. Feel the weight difference. It's the warmest and the quietest, and in a Moncton winter it makes the biggest difference in exactly the rooms you told me are freezing. It's also the one most likely to hit the ENERGY STAR rating that rebate program looks for.

Janette: The bedrooms are the whole reason we're doing this.

Mary: Then here's my honest recommendation. You're staying in this house, your pain is cold bedrooms and rising bills, and your winters are long — that's the exact situation where triple-pane earns its money back in comfort and heat you keep. If the budget were really tight, I'd never be shy about putting double-pane on a couple of secondary windows to save you money. But for your bedrooms and your main living space, triple is the right call — I'd be doing you a disservice to sell you less.

Bob: That actually makes sense.

WHY THIS WORKS **Match the glass to the PAIN and the plan — not to your commission.** Triple where cold, noise, and long-term comfort matter; double where budget is tight or the window is secondary. A rep who'll recommend the cheaper option when it fits earns the trust that closes the whole deal.

- **Let them touch both samples.** Physical comparison — the weight, the extra pane — makes the value of triple obvious without you having to oversell it.
- **Recommend decisively.** You offered the choice, then gave ONE clear recommendation with a reason tied to their words. Advisors recommend; order-takers list options and leave people stuck.

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

[Mary measures each opening, confirming choices out loud.]

Mary: Janette — white frames, or black on the exterior for that updated front-of-house look? ... Black it is. And we'll do triple-pane throughout, since the two "cold" rooms and the living room are the ones that matter most to you.

WHY THIS WORKS Measuring in front of them is a commitment device — the moment they watch you measure and pick colours, they picture it done. Keep them choosing; every small "yes" rehearses the big one.

STAGE 8 · Present the price — two options, one recommendation, then stop talking

Mary turns the device around and walks it top-down, out loud:

Option A — 5 windows, double-pane (Low-E, argon), installed, taxes in	$12,900
Option B — 5 windows, triple-pane (2× Low-E, argon), installed, taxes in · Mary's recommendation	**$15,400**
Or spread it out — illustrative monthly on Option B (use your live financing calculator)	~$295/mo

Mary: So — double-pane, all in with taxes, is twelve-nine. Triple-pane, which is what I'd put in your home, is fifteen-four all in. Or about $295 a month if you'd rather keep your cash where it is. And remember, on the ENERGY STAR triple-pane you may claim the provincial rebate afterward on top of that.

[Mary says the number, sets the device down, and goes silent.]

WHY THIS WORKS **Two options make the recommendation safe.** Bob sees you're not just pushing the top price — the double-pane number is right there. That contrast makes the triple-pane recommendation feel like advice, not pressure.

- **Rebate stays a bonus, never a deduction.** Notice Mary says the rebate comes "afterward, on top" — she never shaved it off the price. Honest, and it protects HTR from a broken promise.
- **Say the price and STOP.** The next person to talk loses. Don't nervously talk past the number and negotiate against yourself. Say it. Sit still.

STAGE 9 · Negotiation — isolate before you ever discount

Bob: Fifteen-four is more than we were hoping to spend.

Mary: Totally fair, Bob — a lot of my customers felt that before they saw the difference in person. Let me ask, so I actually help: if this is the quality and the crew you trust, and we got the number comfortable — is it triple-pane you want in those cold rooms, or would you rather I mix in double-pane to bring it down?

Bob: No... Janette's right, the bedrooms are the point. I just need the number to work.

WHY THIS WORKS **Isolate the real issue.** Mary finds out it's not the product or the company — it's the number. Now she knows a payment fix (not a quality downgrade) wins the deal.

- **Offer the honest downgrade first.** By offering to mix in double-pane, Mary proves she's not just protecting her ticket — which makes Bob trust the triple-pane recommendation even more, and he talks himself back into it.

Mary: Okay — then I won't cheapen the rooms that matter. I've got one crew slot open before winter; if we book it now I save on scheduling and can bring your triple-pane number to fourteen-nine. And moving ahead tonight locks today's pricing before our next material increase. The real question is — warm bedrooms before the snow, off your plate tonight: does that sound good to you both?

Janette: Yes. I'm done scraping frost off the inside of my own windows.

WHY THIS WORKS **Give a REASON for every dollar you move.** Crew slot + price lock — never a naked discount. A discount with no reason teaches the customer your first price was fake.

- **When one spouse turns, sell THROUGH them.** Janette is now your closer. Mary answers Bob but lets Janette 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"

Mary: Of course — real decision. When couples 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 a hiding place, not an objection. The three-option question flushes the real concern into the open so you can actually solve it.

STAGE 10 · The financing reframe — shrink the number

Bob: Fourteen-nine is still a lot up front.

Mary: Up front, yes. But live it the way you actually would — on the monthly it's about $295. You told me your power bill climbs every winter and the bedrooms need a space heater. You're not really adding a bill; you're trading a cold one that keeps rising for a fixed one that ends — and you get warm, quiet, updated windows the whole time you pay it off. Then the provincial rebate comes back to you on top, after.

Bob: When you put it that way...

> **WHY THIS WORKS** Shrink the big number to a monthly bite and anchor it to money they ALREADY spend (rising power bill, space heater). For a budget-minded Bob, the monthly reframe is usually the exact thing that unlocks the yes. Always confirm the real payment on your live financing calculator — never quote a payment from memory.

STAGE 11 · The close & the contract

[Mary doesn't ask "do you want to buy?" She assumes it and moves to logistics.]

Mary: Let's get you set up. Five windows, triple-pane, black exterior, installed before winter — and we'll start upstairs so those bedrooms get fixed first. I just need a couple of signatures and a deposit to lock your crew slot and today's pricing. Bob — for the deposit, e-transfer or card?

Bob: E-transfer's fine.

> **WHY THIS WORKS** **Assume the close on a SMALL yes.** Never ask the scary "will you buy?" Ask "which room first?" and "e-transfer or card?" A yes on a small logistics question IS the sale.
>
> - **Take the deposit.** A signature with no deposit cancels overnight. Deposit locks commitment.

Walk the contract honestly — including the cancellation right

Mary walks them through it plainly: scope and colour, the triple-pane spec, the price and monthly, the deposit and balance on completion, the warranty, the install window, and how the ENERGY STAR paperwork for their rebate claim will be provided.

Mary: One thing I always point out, because it's your right: on an in-home purchase like this there's a cancellation window after you sign. I'm confident you'll be thrilled, but I want you to know it's there. Any questions before you sign?

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

> **WHY THIS WORKS** Volunteering the cooling-off / cancellation right feels scary to new reps — it isn't. In-home ("direct") sales carry a statutory cancellation right, and a rep who states it confidently gets FEWER cancellations and MORE referrals than one who hides it. Confirm the exact current terms and number of days for the customer's province 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

Mary: You two made a smart call — and you made it the right way, matching the glass to what your home actually needs. Here's what happens next: our tech confirms final measurements, your windows go into production, and we book your install before winter. Our order desk will be in touch with the schedule, and you'll get your ENERGY STAR documents for the rebate claim.

Mary: One favour — who else on the street has been fighting cold, foggy windows? If you send someone our way and they go ahead, there's a thank-you in it for you.

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

WHY THIS WORKS **The five minutes after signing prevent tomorrow's cancellation.** Reassure them the choice was smart and lay out clear next steps so there's nothing to panic about overnight.

- **Ask for the referral at peak emotion.** Right after the yes, while the good feeling is highest — never on your way out of a cold appointment.

What Mary did right — the moves that won this deal

- **Both decision-makers present** — Confirmed Janette was home before walking in.
- **Controlled the room** — Kitchen table, TV off, both spouses side by side.
- **Upfront agreement** — Earned a decision tonight AND framed the double-vs-triple choice up front.
- **Qualified inside the conversation** — Pain, urgency, decision-makers, and Bob's budget nerve — without interrogating.
- **Was honest about Maritime rebates** — Never subtracted a rebate; explained it's evaluation-based and paid after. Trust weapon.
- **Matched glass to need, not commission** — Offered double AND triple; recommended triple for the cold rooms with a reason.
- **Gave one clear recommendation** — Advisors recommend; order-takers just list options.
- **Presented two prices, then went silent** — Contrast made the recommendation feel like advice, not pressure.
- **Isolated before discounting** — Confirmed it was the number — not the product — before moving a dollar.
- **Offered the honest downgrade** — Proved she wasn't protecting her ticket — which sold the triple-pane harder.
- **Gave a reason for every concession** — Crew slot + price lock — never a naked discount.
- **Used financing as the real lever** — Not a fake instant rebate — a monthly that fits, anchored to bills they already pay.
- **Sold through the turned spouse** — Let Janette 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 cancellation right** — Built trust; fewer cancellations.
- **Asked for a referral at peak emotion** — Right after the signature.

One-page rep checklist — Maritimes

1. IN THE TRUCK: names confirmed, BOTH glass samples, 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, name the double-vs-triple choice.
5. DISCOVER: pain, urgency, who decides, budget nerve — write their exact words.
6. AMPLIFY: make the cold rooms and rising bills hurt before you price.
7. REBATES (verify live): honest — evaluation-based, paid after, NEVER deducted at the table.
8. GLASS: offer double AND triple; recommend the right one for their need with a reason.
9. MEASURE: in front of them; keep them choosing.
10. PRICE: two options + one recommendation, rebate as a bonus on top, then STOP TALKING.
11. ISOLATE: is it the number, the product, or the company? before any discount.
12. CONCESSION: real reason + tied to tonight; downgrade glass only if THEY want it.
13. REFRAME: shrink to monthly, anchor to bills they already pay.
14. CLOSE: assume it on a small yes; take the deposit.
15. CONTRACT: walk it honestly, state the cancellation right (confirm days for the province).
16. AFTER: reassure, set next steps, hand over ENERGY STAR docs, ask for the referral.

HTR Windows and Doors — Internal Sales Training. Coaching illustration. Rebate programs, amounts, financing payments, taxes, and cancellation-period terms differ by province and change over time — confirm the live program and the customer's contract before use. Rebate figures here are program- and aggregator-sourced as of 2026 and must be verified with the official provider.