

A woman wearing a yellow hat and sunglasses is relaxing in a white hammock. She is lying back with her feet up, looking out a large window. The room is bright and modern, with a grey sofa and a white coffee table in the foreground. The text "Taking peace of mind to a whole new level." is overlaid on the left side of the image.

Taking peace of mind
to a **whole new level.**



**Winters Heating and Cooling
Kick Off and Sales Workshop**

The Advantage Program



**Air Conditioners
and
Heat Pumps**



**Furnaces
and
Boilers**



**Water Heaters
and
Water Treatment**



Each system includes maintenance, filters and comprehensive parts and labor coverage, all for one affordable monthly payment

	<i>Advantage Program</i>	<i>Traditional</i>	<i>Ownership</i>
All-inclusive, worry-free comfort	✓	✗	✗
No trip charges	✓	✗	✗
No diagnostic fee	✓	✗	✗
No repair charges – parts	✓	✗	✗
No repair charges – labor	✓	✗	✗
No lapse in warranty coverage	✓	✗	✗
No lemon guarantee	✓	✗	✗
No cost 24/7 emergency service	✓	✗	✗
Annual maintenance included	✓	✗	✗
Equipment filters are included	✓	✗	✗
No upfront costs or down payment	✓	✗	✗
Fully transferable upon move	✓	✗	✗
No impact to debt / income ratio	✓	✗	✗

Why Do Customers Love Advantage???

Take the worry out of unexpected breakdowns with the Advantage program



Customers enjoy peace of mind with worry-free HVAC & Plumbing solutions



Free up personal capital for better yielding investments



Zero up-front costs and affordable monthly payments



Eligibility for local utility and manufacturer rebates



No monthly rate increases over the original term



E-billing and direct withdrawal available



Includes maintenance at least annually (HVAC)



Customer can make payments via credit card



Unexpected repairs at no additional costs



Fully transferable if the home changes ownership, with an early termination option at any time



Equipment replacement if it can't be repaired



Does not affect the customers debt-to-income ratio

Onboarding and Training Process



Dealer Setup

- ✓ Begin internal brainstorming how you plan to name and market your new program (Worry-Free Program, Ultimate Membership, etc.)
- ✓ Onboarding Package (**Sales User List**)
- ✓ Dealer Reviews Operations Manual, Rate Card(s), Lease Agreement, copy of this Kick Off Presentation
- ✓ Schedule Workshops and Identify key personnel

Key Employees

Role	Name	Email	Phone
Owner	Chuck Kruger	chuck@wintersheatandcool.com	317-504-1239
General Manager	Chuck Kruger	chuck@wintersheatandcool.com	317-504-1239
Sales Manager	Chuck Kruger	chuck@wintersheatandcool.com	317-504-1239
Marketing Company Contact	Chuck Kruger	chuck@wintersheatandcool.com	317-504-1239
Accounting Contact	Nicholle Kruger	Nicholle.kruger@wintersheatandcool.com	317-300-1909
Other (Owner/Financing):	Chris Tuell	chris@wintersheatandcool.com	317-300-1909
Other: (Dispatcher)	Ashley	Ashley@wintersheatandcool.com	

Phone Number/shared mailbox : **317-300-1909 / Ashley@wintersheatandcool.com**

License Numbers: **HH1700037**

Employees: **27**

Preferred Manufactures

Heating & Cooling <small>(Furnace, A/C, MiniSplit, Boiler etc)</small>	Standard Water Heater	Tankless Water Heater	Water Treatment <small>(WATER SOFTENER, WATER FILTRATION)</small>
Trane	N/A	N/A	N/A
Lennox			
Carrier			
Goodman			

* Minisplit manufacture to be provided

Sales Employees

HVAC

Dedicated Sales: **01 (Chuck)**

Selling Techs: **02 (Will & Corey)**

Office/Inside Sales: **0**

Other:

Total: 03

Plumbing

Dedicated Sales: N/A

Selling Techs: N/A

Office/Inside Sales: N/A

Other:

Total: 0

Step Two: Workshops

1. Marketing Workshop (1 hour)

- Understand current marketing strategy
- All launch loose ends
- Training prep
- Owner and marketing participation

2. Funding Process Training (1 Hour) – After Launch

- Anyone involved in the installation, funding, membership, rebate, or registration process
- Can be scheduled for 1 hour at any time



Training Preferences

OCTOBER 2021						
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

NOVEMBER 2021						
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Any upcoming time off or other conflicts? Which days work best and which days definitely do not work?

Training Process

Tentative Schedule

7:30am-8am: Overview Training

- Customer Service, Dispatch, Non-Selling Techs, Admin, Leaders
- High level understanding of program and customer benefits



8am-11am: Classroom Sales Training

- All selling employees (Sales, Selling Techs, Plumbers, Inside Sales, and Leadership)
- Program Education
- App Training
- Role-play

12pm-5pm: Field Sales Training

- Join sales team on afternoon appointments for hands-on training



- ✓ Immediate visit after training – 1 to 2 weeks after training
- ✓ One on one phone calls with sales team
- ✓ Individual training as needed for new or existing employees
- ✓ Group onsite training monthly – as needed
- ✓ 24/7 Advantage Alliance Sales Support Hotline **(833-549-2457)**