



TRI-COUNTY
REGIONAL ENERGY NETWORK
SAN LUIS OBISPO • SANTA BARBARA • VENTURA

Psychology of the Electrification Sale: Part 1

Larry Waters – Electrify My Home

October 9, 2025



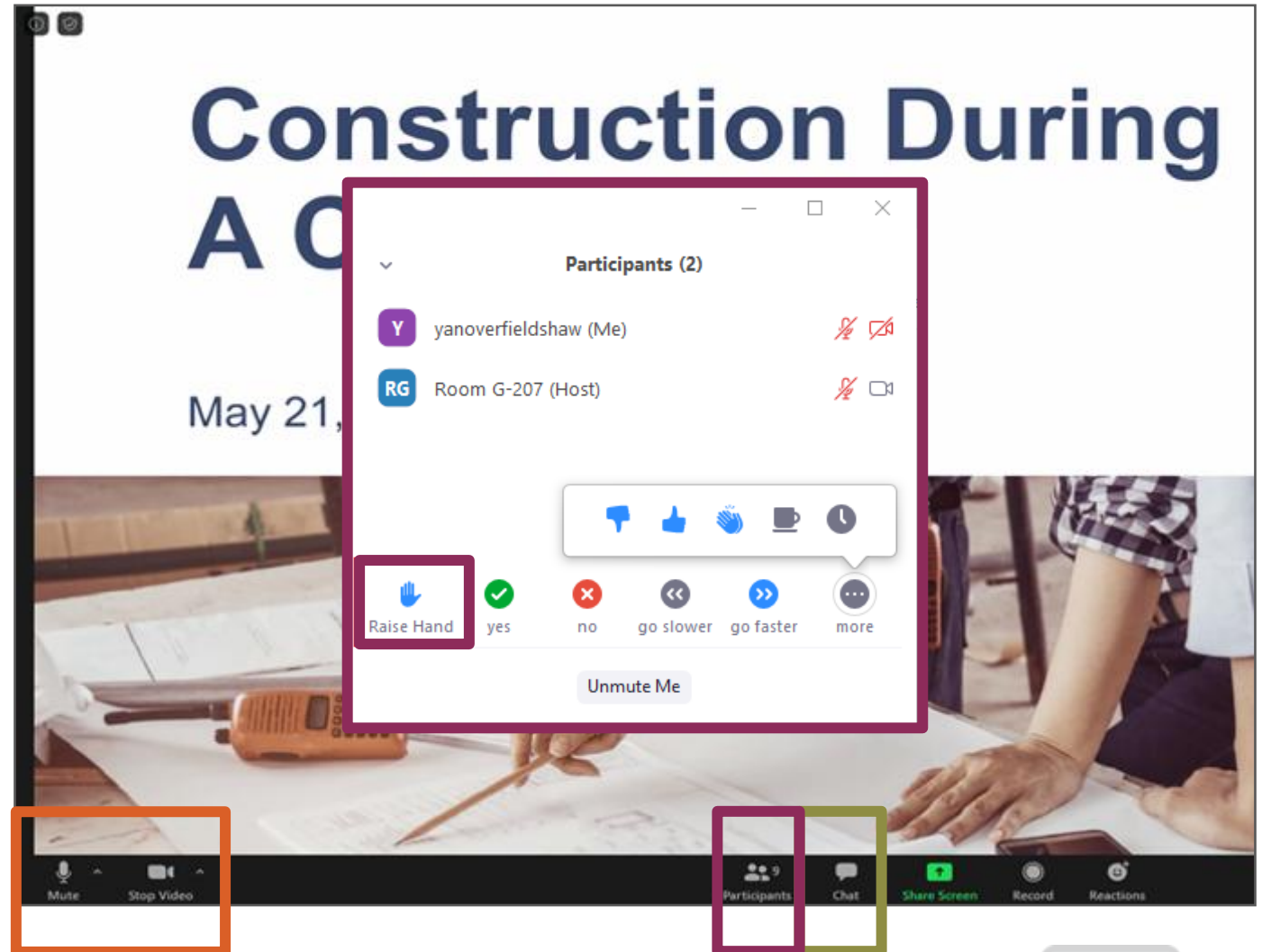
Reminder to take your free
DISC personality assessment
if you haven't already!

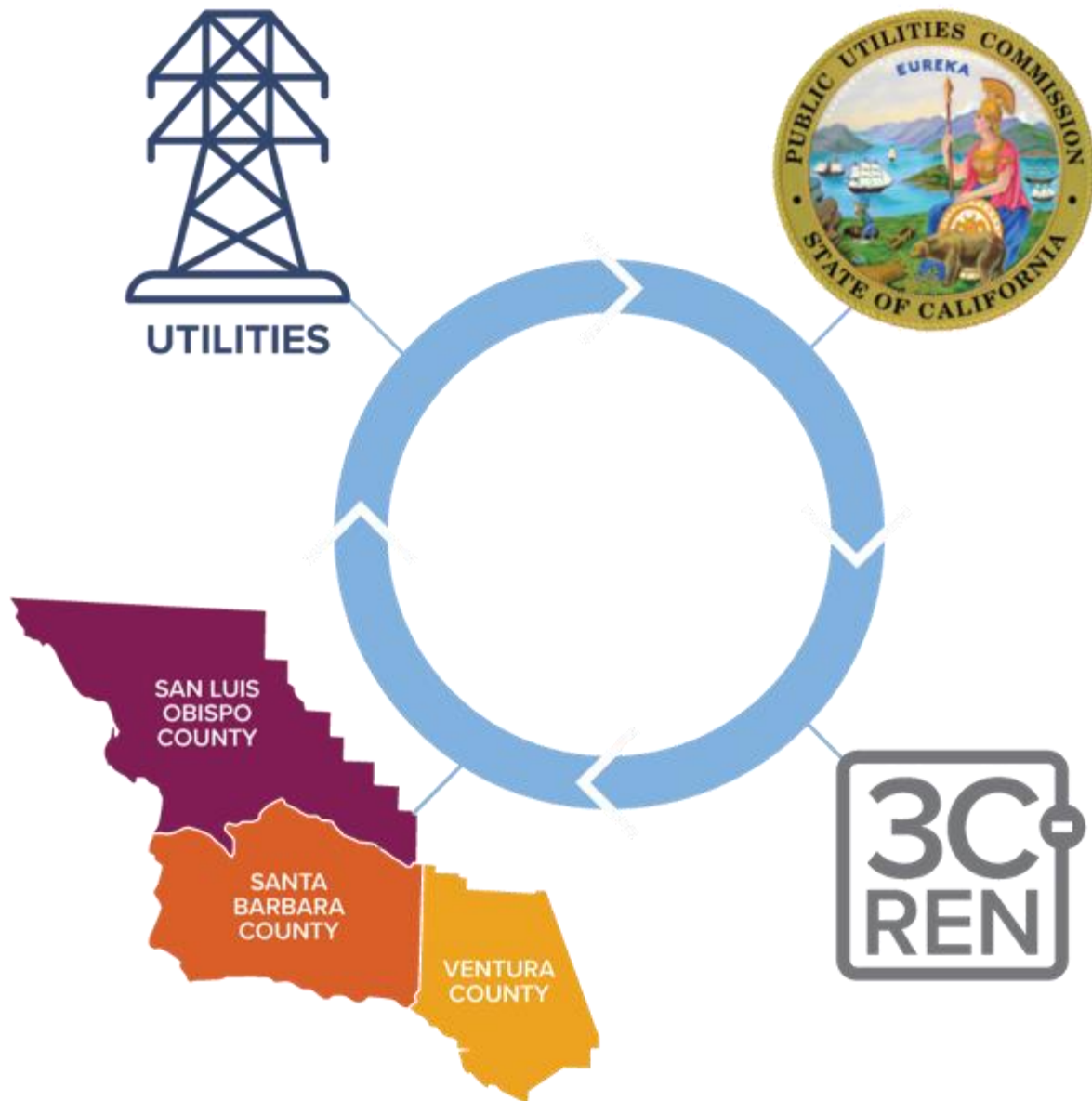


Before We Begin

Here are some quick reminders:

- Did you call in? Please **share** full name to confirm attendance
- Use the "**Chat**" to share questions or comments.
- Session may be **recorded** and posted to 3C-REN's on-demand page
- 3C-REN does **not** allow **AI notetakers**, unless used to accommodate a disability





Tri-County Regional Energy Network

3C-REN is a collaboration between the tri-counties

Our programs reduce energy use for a more sustainable, equitable and economically vibrant Central Coast

Our free services are funded via the CPUC, bringing ratepayer dollars back to the region



Our Services

Incentives



HOME ENERGY SAVINGS

3c-ren.org/for-residents
3c-ren.org/multifamily



COMMERCIAL ENERGY SAVINGS

3c-ren.org/commercial

Contractors can enroll at
3c-ren.org/contractors

Training



BUILDING PERFORMANCE TRAINING

3c-ren.org/events
3c-ren.org/building



ENERGY CODE CONNECT

3c-ren.org/code

View past trainings at
3c-ren.org/on-demand

Technical Assistance



AGRICULTURE ENERGY SOLUTIONS

3c-ren.org/agriculture



ENERGY ASSURANCE SERVICES

3c-ren.org/assurance



3C-REN Achievements



4,000+

Individuals Attended
Training



1,374

Energy-Saving
Projects Completed



334

Title 24/CalGreen
Questions Answered



\$155M

Secured for investment
in the tri-county region
through 2028

Data from 2019-2023 for three programs



Electrify My Home – Electrification Pioneers

Our Mission:

*To provide the **most efficient** cost-effective solutions, practice responsible **electrical management**, and **train and influence** others to do the same.*



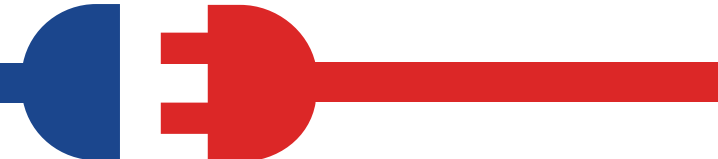
Agenda

Part 1 (Laying The Foundation)

- 🔌 Welcome & Mindset Reset
- 🔌 Personality Basics & DISC Profiles
- 🔌 The Intake Process
- 🔌 Customer Research
- 🔌 Consultative Selling Skills
- 🔌 Wrap-Up

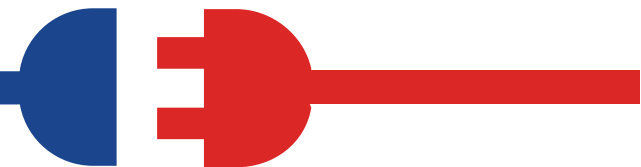
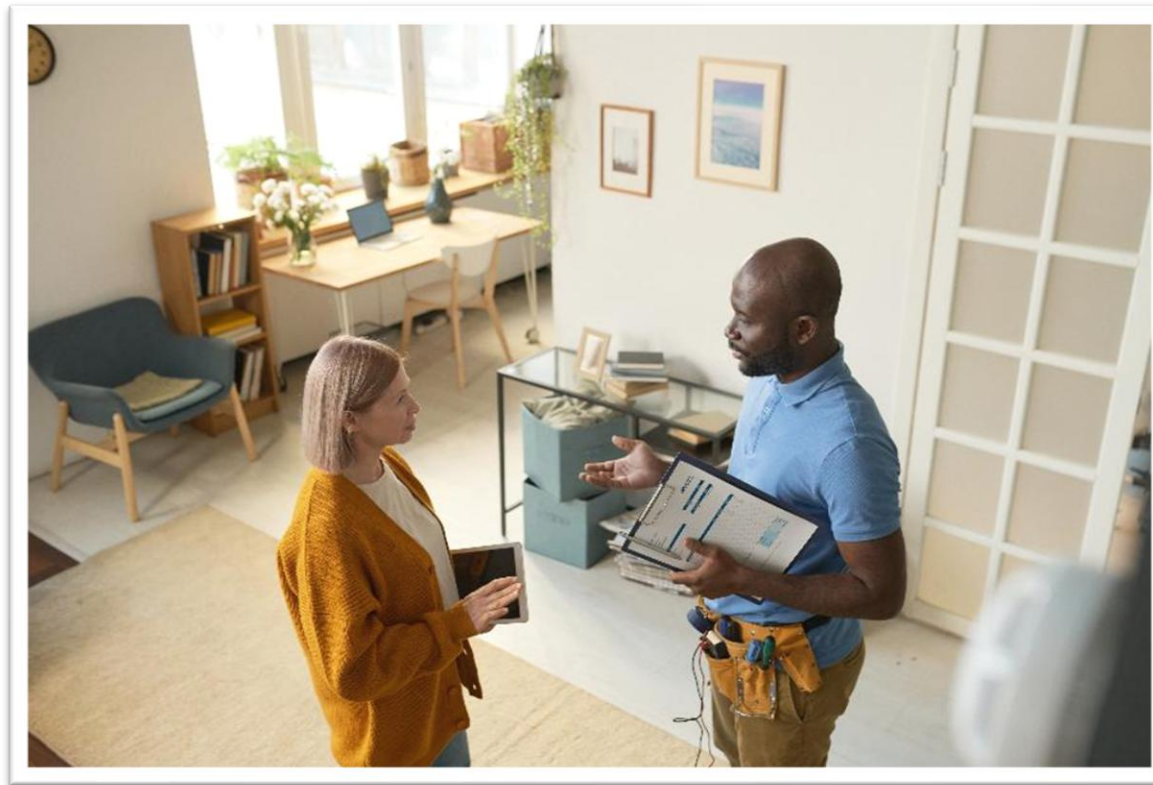
Part 2 (NEXT WEBINAR, Connecting The Dots)

- 🔌 Welcome & Part 1 Review
- 🔌 Comprehensive Assessments
- 🔌 From Intel to Plan
- 🔌 Setting Expectations
- 🔌 Objection Handling & Final Close
- 🔌 Wrap-Up



Poll

🔌 What's the biggest barrier to selling more electrification products?



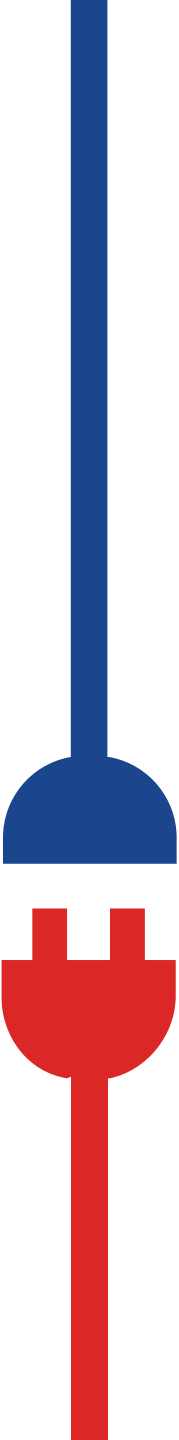


Intro

MINDSET RESET

"Your mindset is your megaphone."

“Dump Your Cup”



THE OPPORTUNITY IS HUGE

We're Talking a \$1 Trillion+ Market

6 Million

Heat Pumps by 2030 (Governor)

Zero Emission

Appliances required 2030 (CARB)

90%

90% of CA homes rely on gas for
space or water heating ¹

3.4 Million

CA homes with no AC ²

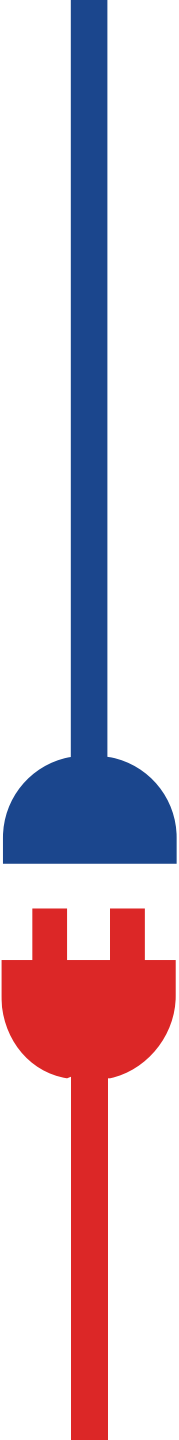
¹ Decarbonization of Heating Energy Use in California Buildings. Synapse Energy Economics, Inc. 2018.

² Canary Media. "California could ban new gas heaters after 2030. The goal: healthier air." 2022



More About This Once-In-A-Career Opportunity

- ⚡ The technology is ready
- ⚡ California is the perfect climate for heat pumps
- ⚡ Solar & storage is abundant
- ⚡ More customers are seeking energy independence



More About This Once-In-A-Career Opportunity

- ❖ Flocks of older HVAC companies are **retiring**
- ❖ Lots of opportunity to become a true
“**electrification specialist**”
- ❖ Some local governments are encouraging &
incentivizing early system replacements
- ❖ More work = **more money**
- ❖ More work done well = **extremely rewarding**



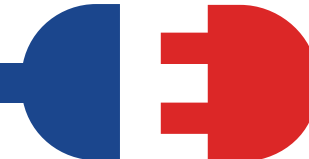


Get Your TEAM On Board!



Our Favorite Benefits of Correctly Designed Electrification Upgrades (HVAC Focused)

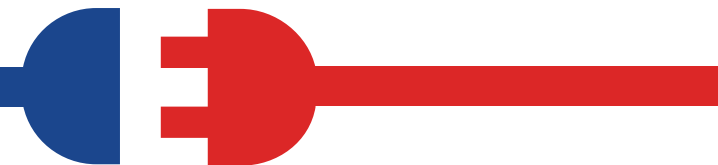
- 1) Better Comfort
- 2) Quiet
- 3) Enviro. Friendly
- 4) Safer
- 5) Indoor Air Quality



TRUST WHAT YOU SELL

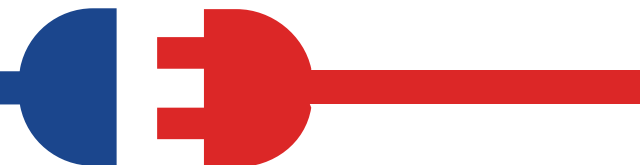
“If they feel your belief, they’ll feel the relief”

- ⚡ Customers sense your confidence (or hesitation)
- ⚡ Trust is contagious — when you trust it, they trust it
- ⚡ Belief in solutions makes selling natural, not forced
- ⚡ Builds credibility, loyalty, and long-term relationships
- ⚡ Aligns your values with the homeowner’s investment

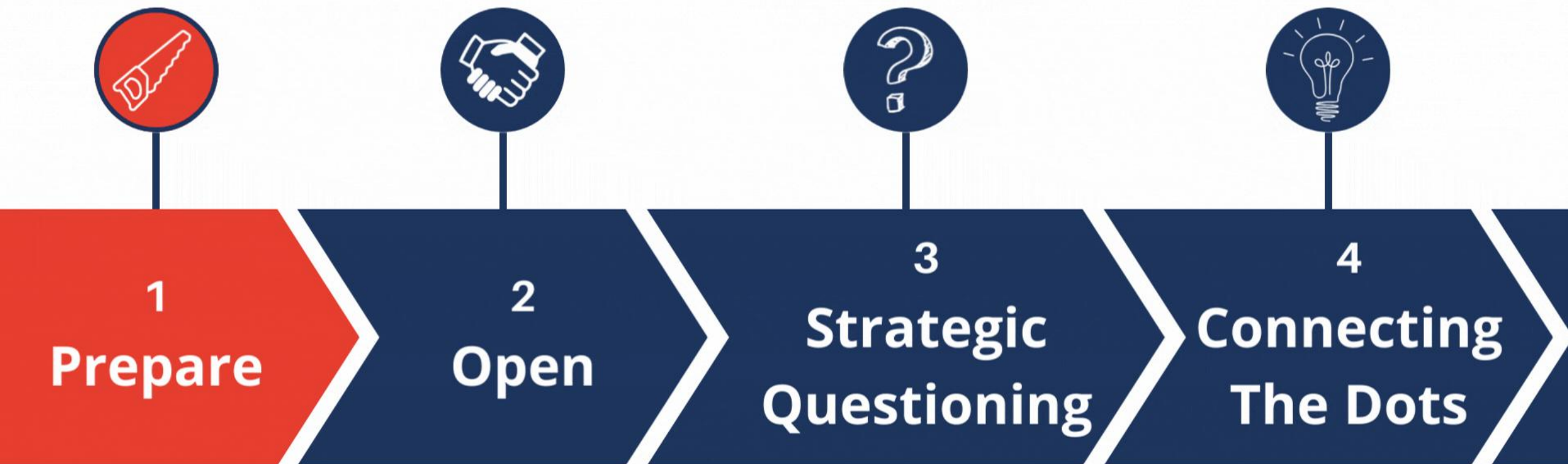


TAKE OUR WORD FOR IT

- ⚡ When **designed, planned & executed** correctly, **THIS STUFF WORKS!**
- ⚡ Properly **sized & installed** systems = **comfort, performance, reliability**
- ⚡ Smart **planning** avoids oversizing, missed upgrades, & costly mistakes



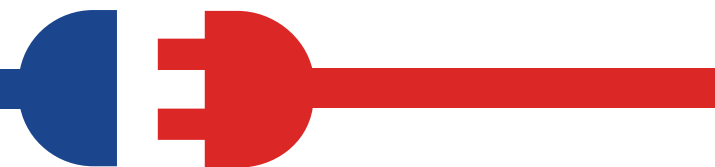
Must-Have Sales Process – Prep



Part 1 Focus

A bit now and next meeting

Part 2 Focus





Prepare

KNOWING YOUR CUSTOMER

Know your client's personality type

Determining Personality Type

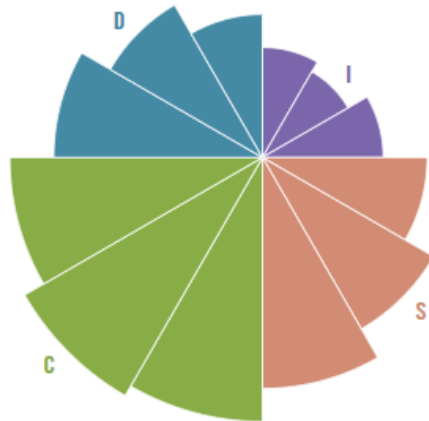
Realizing your client's personality starts with knowing your own

DRIVE

Takes charge to get things done.
Makes decisions and takes action.

CLARITY

Works steadily within systems.
Focuses on order, accuracy and precision.



INFLUENCE

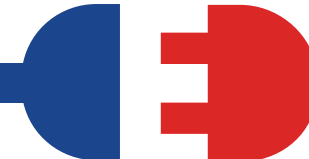
Engages others and shares enthusiasm. Inspires and persuades others.

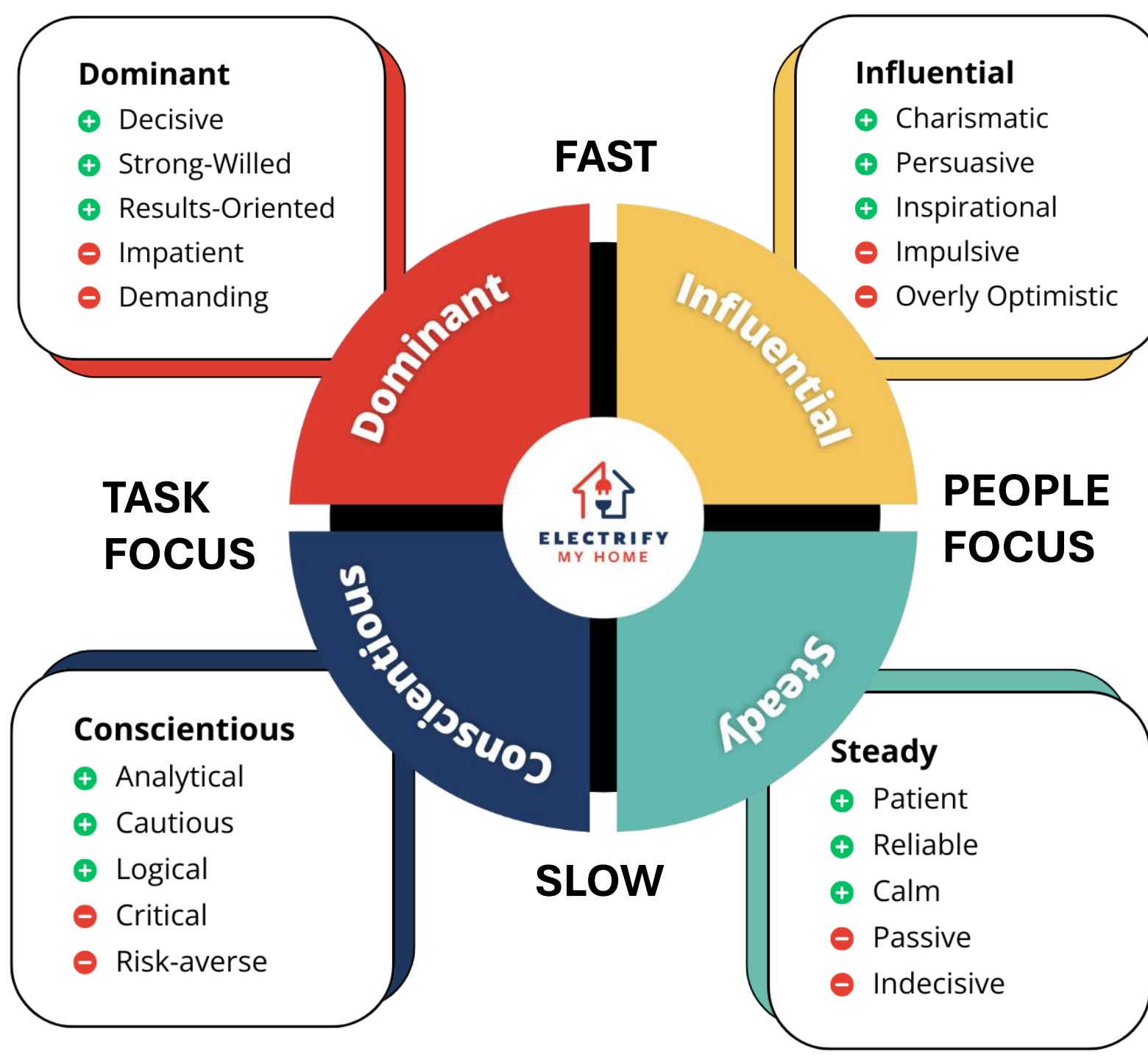
SUPPORT

Is helpful and shows care for others. Looks for ways to assist and serve.



SCAN ME





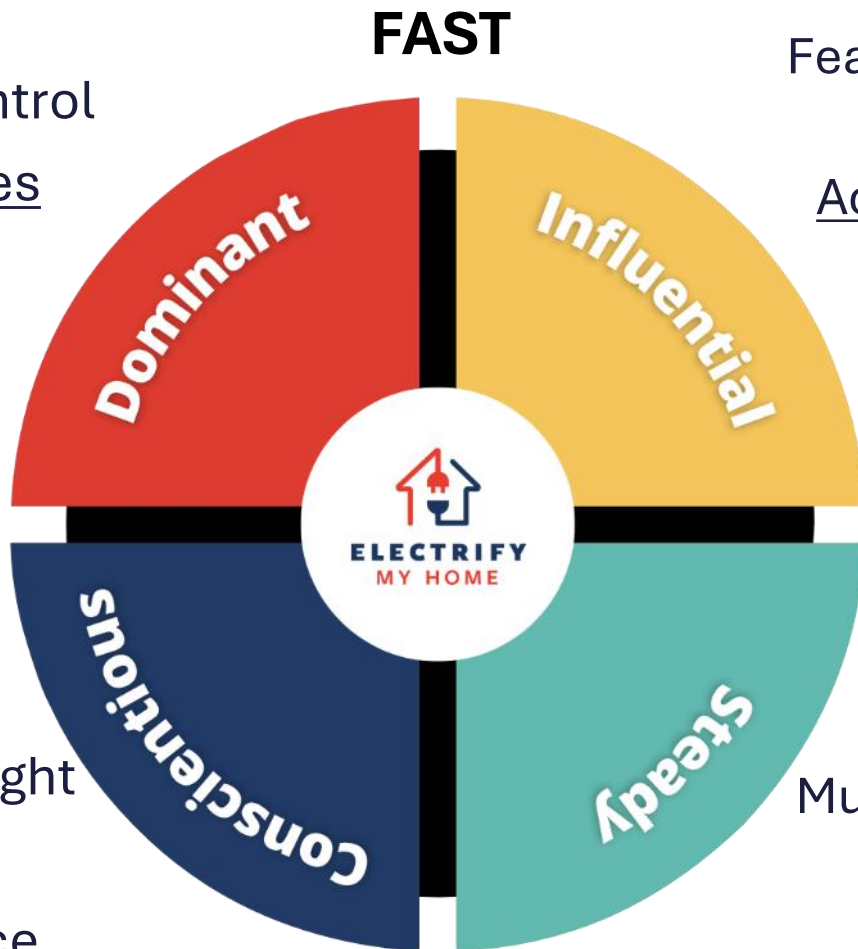


Must always Win
Seeks Power
Fears loss of Control
Provide Choices

Must always be Loved
Seeks Recognition
Fears loss of Prestige
Provide
Acknowledgement



**TASK
FOCUS**



Must always be Right
Seeks Respect
Fears loss of Face
Provide
Information/Data

Must always Cooperate
Wants to be safe
Seeks Approval
Fears loss of
Relationship
Provide Acceptance





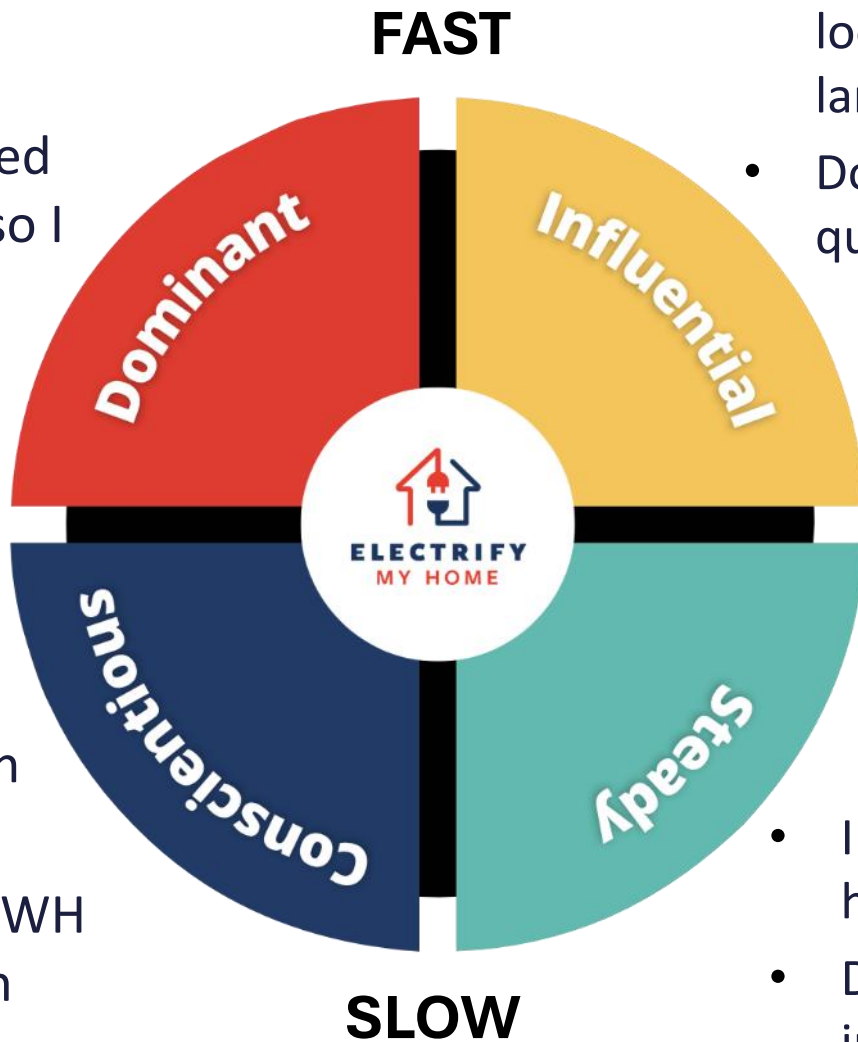
- The system must get the house warm fast
- I need it installed on a Saturday so I can supervise

- 2 outdoor units? I don't think that would look good w/ my landscaping.
- Does this have the quiet side fan feature?



**TASK
FOCUS**

**PEOPLE
FOCUS**



- How many kWh will I save?
- Can you set HPWH venting so I can capture the cooling?

- I hear refrigerants are harmful, is that true?
- Disruption during install worries me; how long will it take?

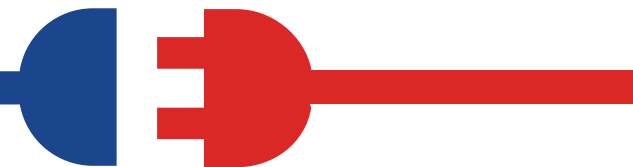
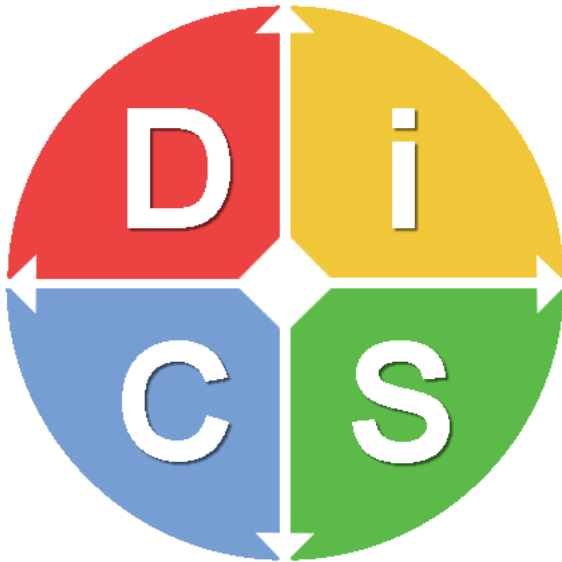


Class Exercise – DISC

🔌 You Show Me Yours, I'll Show You Mine (DISC RESULTS)

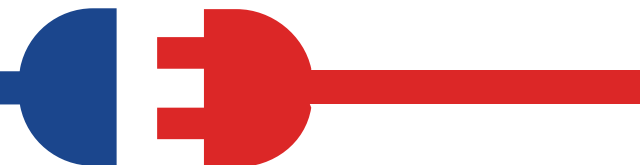
🔌 Heat Pumps are great because _____

...They'll save you \$250/year
...They're great for the environment
...They're safer for my family
...They're the latest and greatest
...They come with a great warranty
...The outdoor units have slim profile
...They have a wide capacity range
...They have huge efficiency ratings
...They provide optimal comfort



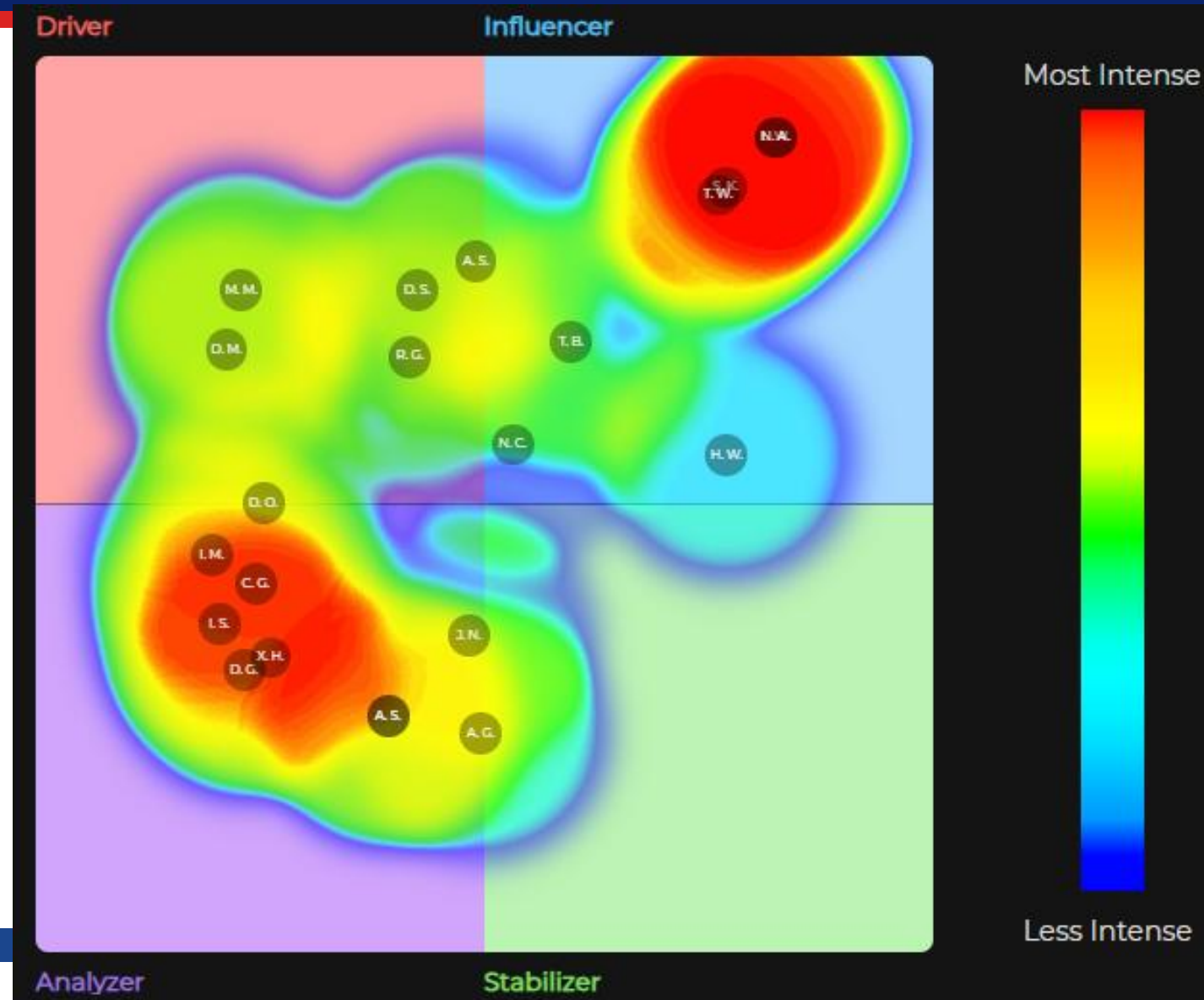
Why Understanding Personality Is a Secret Sales Weapon

- ✦ **Salesperson:** “Check it out, this brand-new heat pump model connects to the cloud and does everything but cook your breakfast for you.”
 - ✦ **D:** they’ll probably be out of business in a year, no thanks
 - ✦ **C:** that’s nice, what’s the SEER rating?
 - ✦ **S:** I was hoping for something modest; perhaps you have something else?
 - ✦ **I:** where do I sign?
- ✦ Lesson 1 – **your buying habits** aren’t typically your customer’s habits
- ✦ Lesson 2 – your customers **shouldn’t have to** pry the right solution out of you



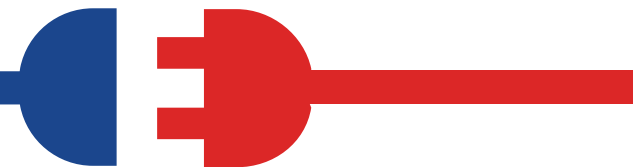
Personality Identification Impacts Everything

- 🔥 Marketing
- 🔥 Employee Dynamics
- 🔥 Sales Consults
- 🔥 Installer Communications
- 🔥 Your marriage/relationships?



A Note on “Profiling”

- ⚡ **Salesperson:** “a person whose job is to sell things”
- ⚡ **Consultant:** “a person who provides expert advice professionally.”
- ⚡ Some people offended by “**profiling**” customers, but that’s off base:
 - ⚡ Our focus: deliver the **right product** with the **right message**
 - ⚡ Humans aren’t robots; we interact **emotionally** [more on this later], so we must adjust accordingly





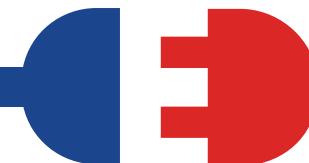
Prepare

THE INTAKE PROCESS

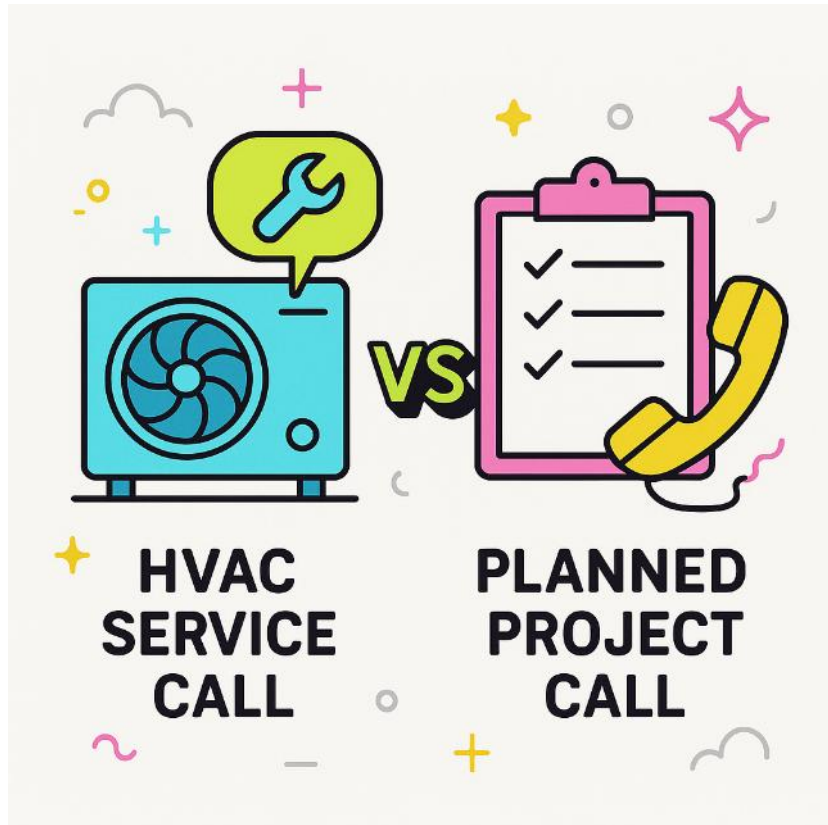
Customer Experience Starts At First Touch

Want A Successful Sale? Revisit Your Customer Journey

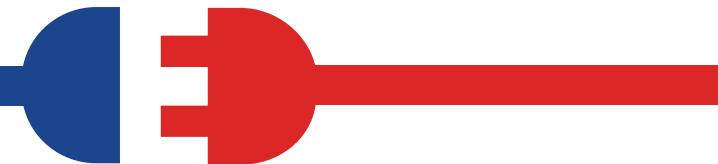
- ⚡ Sales = team effort
- ⚡ Begins with your **online presence**
- ⚡ Continues with the first **phone call, contact form, or email**
- ⚡ **Goal: turn information gathering into relationship building**



Categorizing Opportunities

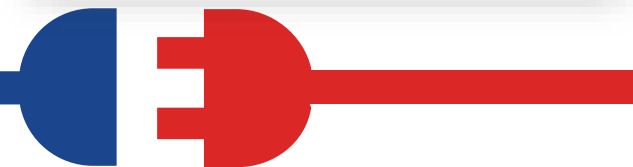
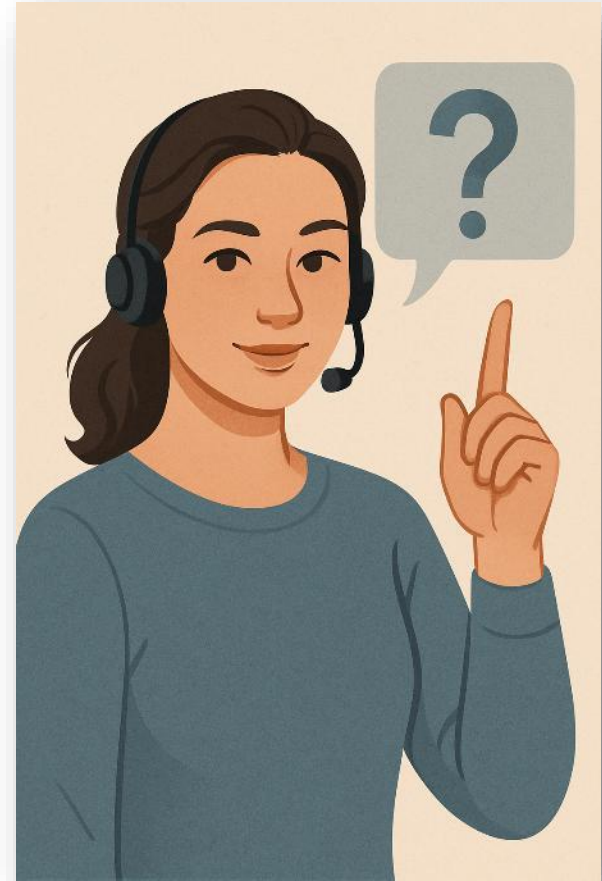


- ✦ Train CSRs to quickly recognize **call type**
- ✦ **TIP1:** Show competence & confidence by **repeating back to** the customer
- ✦ **TIP2:** Use AI Tools (phone assistants, notetakers)
 - ✦ Identify **DISC** type early
 - ✦ Use insights to **classify call**
 - ✦ Use insights to **tailor future proposal**



Top Intake Questions

- ⚡ Can I start with your name, address, and the best number/email to reach you? Preferred means of contact?
- ⚡ How did you hear about us?
- ⚡ What prompted you to call today?
- ⚡ When was your current system installed?
- ⚡ Are there other concerns you would like us to address?
- ⚡ Who else will be involved in the decision?





Prepare

CUSTOMER RESEARCH

A little digging goes a long way

Which One Do They Want?

*The high-pressure
salesbro who
wants to win on
charm?*



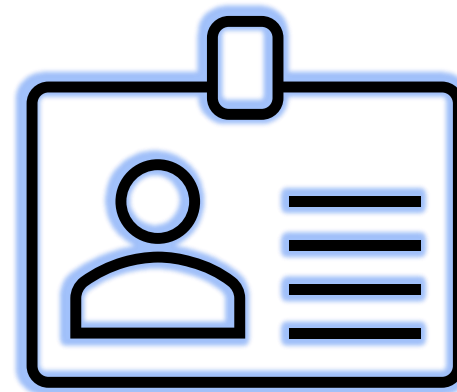
*The person
who's shown
they've done
their homework
and cares about
their customers?*

Do Your Homework

What info do you have at every call?



Address

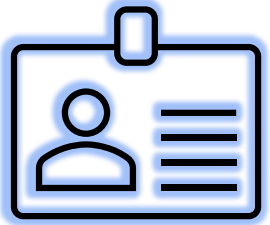


Name

Do Your Homework



- ✦ **Address:** Street view, satellite view, year built, sqft, beds/baths, date of last sale, home value, home features, photos (if listed recently)



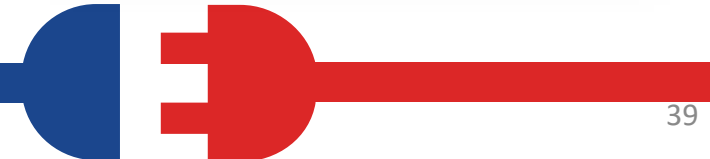
- ✦ **Name:** LinkedIn (profession, past jobs, where they lived previously), Facebook (if public), personal website, work website



- ✦ Have a **past customer** nearby? Give them a happy call & ask if they'll be a reference.

Do Your Homework

- ⚡ **Optional: Enter known info into ChatGPT or system of choice**
 - ⚡ Dispatch notes
 - ⚡ Address (or just city/zip)
 - ⚡ LinkedIn profile
- ⚡ **Ask, “provide tips on how to best sell this customer a heat pump for their aging furnace.”**
- ⚡ **Be careful with results!**



Sample Output

Key messages & talking points for him (tailored)

- “This is a long-term asset, not a quick fix.” He sees property as capital, so he’ll view this as upgrading the building.

What to avoid / pitfalls with him

- Avoid vague promises (“you’ll save tons”) without numbers and disclaimers.
- Avoid ambiguity in contract or scope. He will poke holes in ambiguity.
- Avoid ignoring “what if” scenarios — he’ll ask.
- Avoid “hard sell / emotional gimmicks.” He’s likely resistant to high-pressure tactics.
- Avoid glossing over performance under stress. He’ll question failure points.
- “Improved comfort, quiet, maintenance reduction.” These are interior quality-of-life improvements that he may appreciate.
- “Future flexibility / modularity.” So if he does future property changes, redevelopment, or sells, the system is a selling point.



Open & Strategic
Questioning

CONSULTATIVE SELLING SKILLS

Let your customer sell themselves

What Is Consultative Selling?

 Ask, Don't Tell

 Listen to Understand,
Not to Respond

 Guide,
Don't Push

***The practice of guiding
customers to their own
best decision***

***Takeaway:** Consultative selling isn't about closing deals; it's about opening conversations (and hopefully closing the sale in return).*

How Do People Buy?

Awareness → Interest → **Emotion** → **Logic** → Commitment



EMOTION



LOGIC

How Do People Buy?



EMOTION

Gerald Zaltman (Harvard Business School):
95% of purchase decisions are driven by subconscious emotion, not rational thought.

Antonio Damasio (Neuroscientist): *Those with damage to emotional centers of the brain couldn't make even simple decisions*



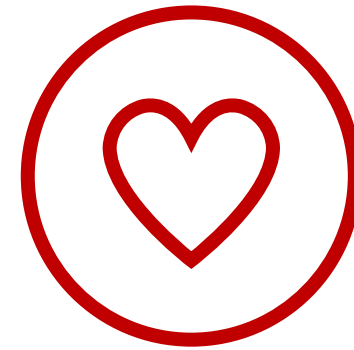
LOGIC

Daniel Kahneman (Behavioral Economist):
People make decisions emotionally and then rationalize them with logic.

Paul Ekman (Psychologist): *Emotions drive behavior, but reason governs whether we follow through.*

How Do People Buy?

- ⚡ Customers buy **comfort, trust, and confidence**, not equipment
 - ⚡ “Sell the sizzle, not the steak”
- ⚡ **Emotion drives action:** fear of failure, desire for comfort, pride in doing the right thing
- ⚡ Begin by understanding what they feel and why they reached out



EMOTION



LOGIC

- ⚡ Logic **reassures** emotional brain that the decision is **safe & smart**
- ⚡ Consultative selling **adds structure** – performance data, costs, timelines, and design
- ⚡ Facts don't persuade; they reinforce confidence in what the customer already wants

How Do People Buy?

EMOTION



*I Want To
TRUST You*

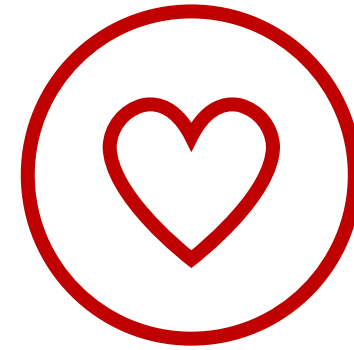
LOGIC



*I Want To
UNDERSTAND You*

How Do People Buy?

- ⚡ **Trust** – be transparent, explain your process
- ⚡ **Empathy** – acknowledge pain points before solving them
- ⚡ **Confidence** – speak calmly, not urgently
- ⚡ **Respect** – ask permission before explaining
- ⚡ **Belonging** – show social proof



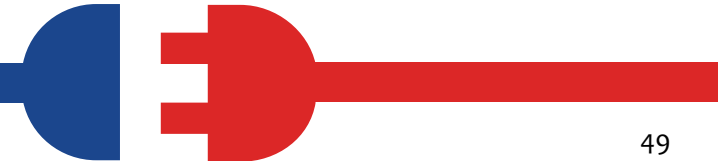
- ⚡ **Clarity** – simple visuals, confirm their understanding
- ⚡ **Evidence** – case studies, testimonials
- ⚡ **Control** – explain timelines and steps (e.g., HERS, permit)
- ⚡ **Competence** – show technical aptitude tailored to customer

Must-Have Sales Process – Open

The Approach & Observation



- ✦ Be observant as you approach the customer's home; look for clues that could help guide you
 - ✦ Electric or hybrid car?
 - ✦ Solar panels?
 - ✦ Modern home design?
 - ✦ Drought-tolerant landscape?



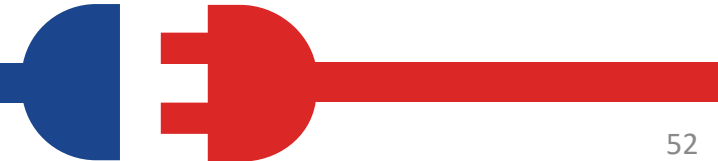
Two Ears, One Mouth



Take Some Time to Chat and Build Rapport, Gather Clues to Guide Your Approach



- ⚡ Listen your way to success
- ⚡ Starts with first impression call first and be on time
- ⚡ Always give a sincere compliment
- ⚡ Be observant of the decor
- ⚡ Look for conversation starters
- ⚡ Try to pinpoint personality type: Analytical, Empathetic, Influencer, Alpha, or Driver



Must-Have Sales Process – Questioning

The Art of Asking Good Questions

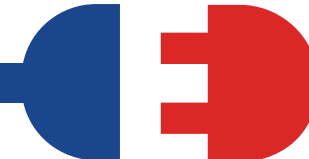
“ Successful people ask better questions, and as a result, they get better answers
— *Tony Robbins*

” Most people do not listen with the intent to understand; they listen with the intent to reply
— Stephen R. Covey

“ The ability to ask questions is the greatest resource in learning the truth
— Carl Jung

Benefits of Strategic Questioning

- ⚡ Introducing questions leads to providing **more value**
- ⚡ Lowers the barrier to being **honest** and **candid** because it provides a basis for your questions
- ⚡ Allows you to drill down to **relevant insights**/issues they might not think of on their own
- ⚡ Allows you to establish yourself as a **knowledgeable problem solver**... Credibility and Trust

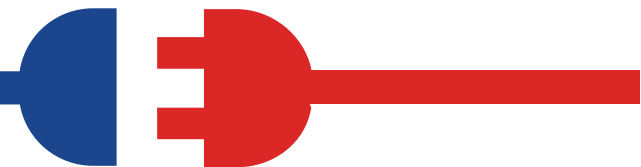


First Questions

Level Set & Determine Personality Type

A few to get started:

- ⚡ Are you a person who prefers more information and data or do you make decisions based on professionals you trust?
- ⚡ If you had to choose, would you rather have lower utility bills or a more comfortable home?
- ⚡ How important is it for you to have the latest technology in your home?
- ⚡ How long do you plan to stay in your current home?
- ⚡ Are there any other home upgrades you're planning in the next few years?



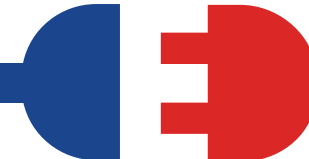
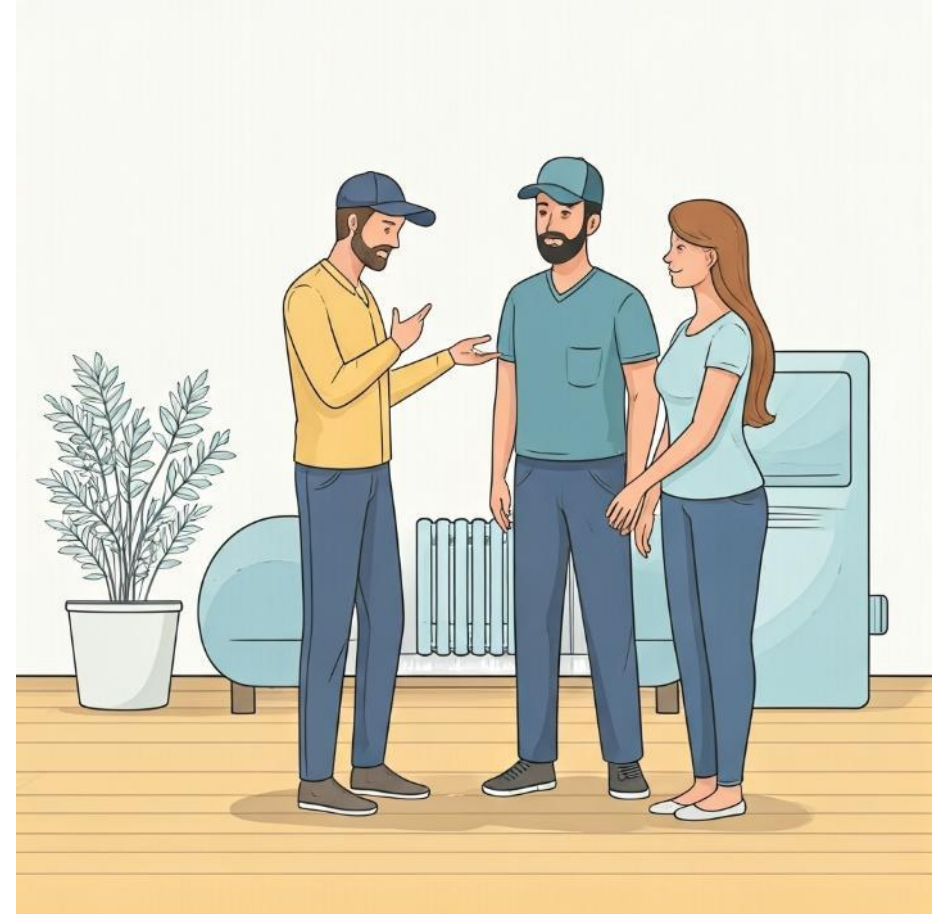
Motivations

“What has led you to wanting to pursue a heat pump at this time?”

Their answer:

“We’re concerned about our high AC bills in the summer...we have solar and heard that heat pumps can save money.”

What would you ask next?



OTHER RESPONSES – What’s Next?

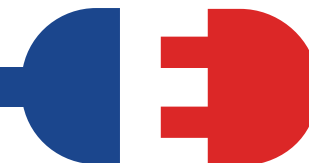
Sample Answers:

“Some friends have just installed a heat pump and are very happy with the results.”

“Our grandchildren spend a lot of time with us, and we want to make sure that the indoor air quality is OK.”

“We have been considering going all electric for a while, and now the timing seems right.”

What would you ask next?



Part 1 Takeaways

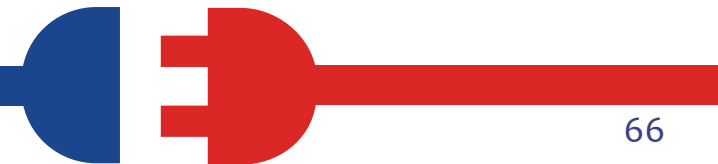
-  Believe in What You're Selling
-  Understand Personalities (DISC)
-  Do Your Research and Prepare
-  Start with Emotion, Support with Logic
-  Intake Sets the Tone
-  Ask Better Questions
-  Be the Guide, Not the Pitch

Questions? Stay in Touch!

Join us for PART 2 (Connecting The Dots)
NEXT THURSDAY October 16th



Larry Waters | 707-840-3411 | www.electrifymyhome.com | info@electrifymyhome.com



Closing

- **Coming to Your Inbox Soon!**
 - Slides and Recording
- **Come back for Part 2 of this series on October 16!**
- **In-Person Events! Register on www.3c-ren.org/events.**
 - October 28 – [Renewable Energy, Energy Storage, and Resiliency](#) – In-person happy hour!
 - November 4 – [Regional Energy Forum](#)
 - Free in-person forum bringing together building professionals, policymakers, and community members to explore how the built environment can adapt to the growing challenges of wildfire.
 - Plus, a networking lunch, optional zero net energy building tour, and a giveaway for an air purifier!

Any phone numbers who joined? Please share your name!

**Preparing Buildings for Wildfire Resiliency in 2025 and Beyond**



Tuesday, Nov. 4 | 10 am - 1 pm | Santa Barbara
Louise Lowry Davis Center

Post-Forum Net Zero Building Tour
1:30pm - 2:30 pm
County of Santa Barbara Emergency Operations Center
and Regional Fire Communications Center



Scan the QR code or register at
3C-REN.org/forum



Thank you!

More info: **3c-ren.org**

Questions: **info@3c-ren.org**

Email updates: **3c-ren.org/newsletter**



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