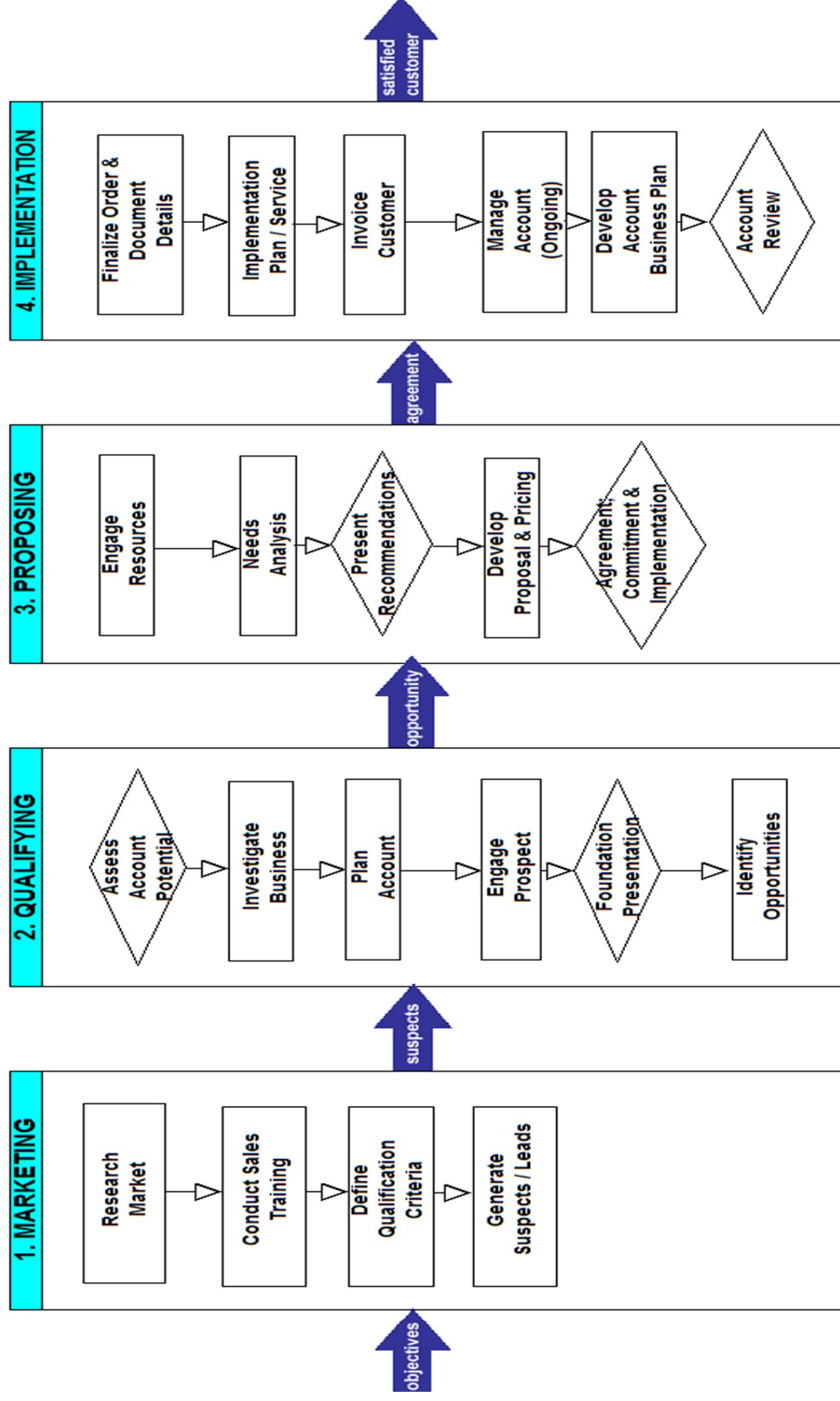


# POWERMATE SALES PROCESS



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## CUSTOMER FOCUS PROCESS

## FORWARD

July 31, 2015

The following document outlines the Sales Process used by PowerMate®. The document is designed for Sales Representatives or “Solution Specialists” of all levels of expertise; from “One-Offs” to “Major” Accounts.

Hopefully, the purpose of this document is apparent, to:

- ✓ Share, Educate and Inform;
- ✓ Empower Sales;
- ✓ Define the Process for Sales at PowerMate®;
- ✓ Highlight the tools and resources available to you;
- ✓ Assist us in making more sales;
- ✓ Realize the maximum potential of a Customer opportunity;
- ✓ Improve our call-to-close ratio;
- ✓ Relate the Sales Process to our CRM called “Profits”
- ✓ Provide a template for dealing with Accounts of all sizes.

Regardless of your level of experience, the document incorporates techniques proven and used by successful Sales People. It has been customized and developed to reflect the “uniqueness” of our business.

If you are a new Solution Specialist, you are to follow the same sales process with the exception of being on an “expedited time-line.” For a “One-Off” Specialist, the document is designed to challenge you to develop your skills to help optimize your productivity and effectiveness in your daily Customer contacts.

If you are dealing with larger; Key and Project Accounts, the document is designed to give you a template for working with these Customers and the unique challenges they can present.

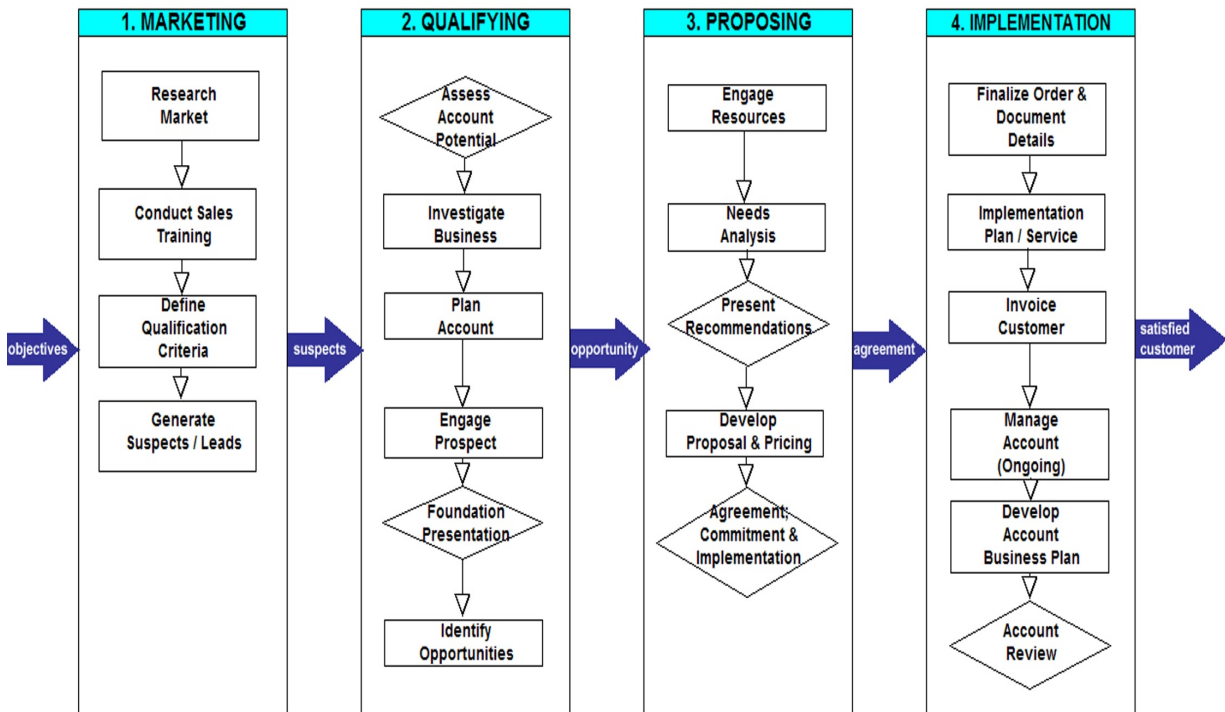
If after reviewing the document, you have any questions or suggestions please do not hesitate to ask!

In closing, We all want to be successful, let’s work together to make it happen!

Paul Gazik,  
Business Development



## POWERMATE SALES PROCESS



### 1. ACTIVE-A “Assess Account Potential”

- i) Learn about how the customer does business today, identify opportunities, present solutions - Establish; Need, Frequency and Use.
- ii) Learn how and who makes decisions in the Company.
- iii) Identify Account type - Bottom-up (“Project Acct.”)? Top down (“Key Acct.”)?

### 2. “Foundation Presentation”

- i) Develop Strategy and Plan to “partner” with the customer.
- ii) Match the PowerMate® machine to the customers’ application.
- iii) Identify their needs - make their goals our goals.

### 3. ACTIVE-P “Present Recommendations”

- i) Money, do they have it?, can they spend it?, when?, what is the process?
- ii) Present Business Case and Customer Proposal With Return On Investment (ROI).

### 4. ACTIVE-C “Agreement & Commitment”

- i) Gain customer commitment and close.
- ii) Complete with time line

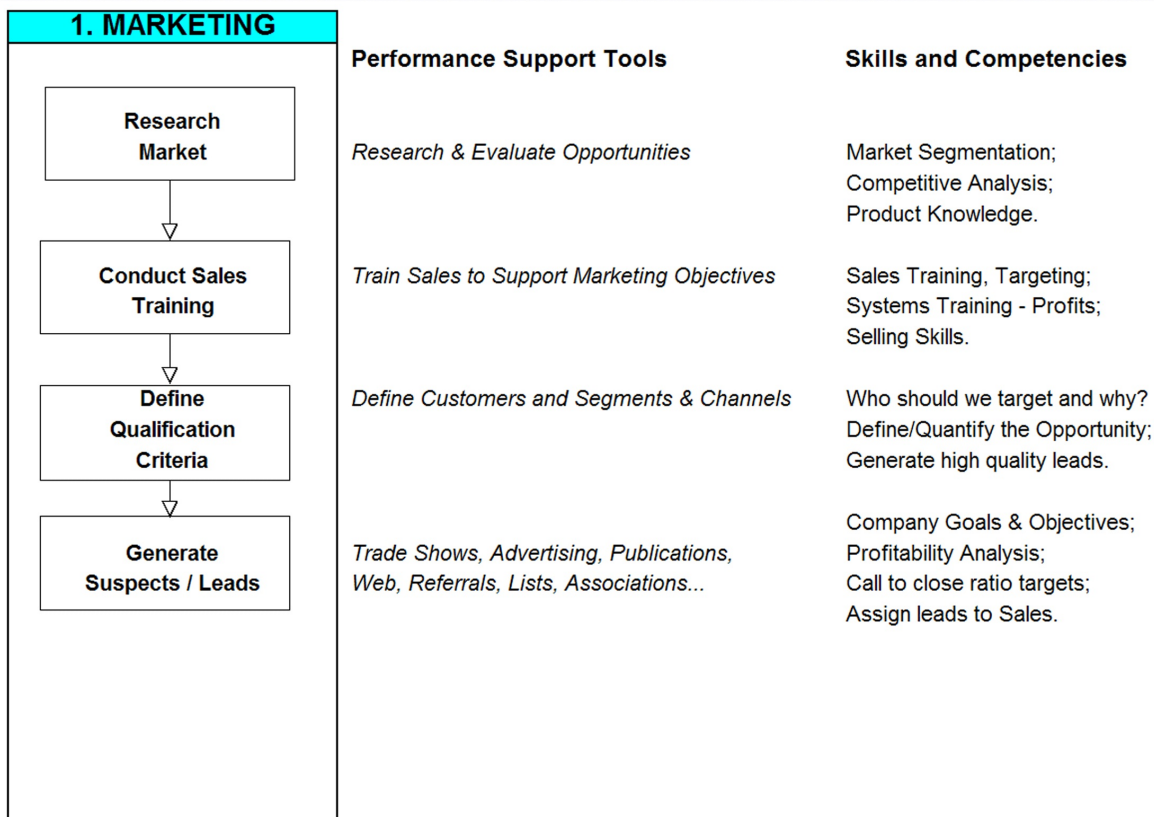
### 5. ACTIVE-I “Implementation”

- i) Detailed Implementation Plan

### 6. ACTIVE-R, ACTIVE-S AND SERVICE “Account Review”

- i) Account Reporting, Monitoring and Review.
- ii) Sale and Post Sales Support and “networking”.
- iii) Look for new opportunities and referrals...

## Customer Focus Process



***Always fill the customers "Value Bucket"***

### Objectives for dealing with Key and Project Accounts:

- Collect/Analyze all relevant information required for you to complete a Business Case and Customer Proposal
- To realize the "full potential" of the account. Not looking to sell one or a few machines. What do we have to do to get all the business.
- Long term relationship building, In it for the long haul.
- Make the customers priorities and objectives our priorities and objectives.
- You are the "Project Manager" You need to co-ordinate and lead.
- Show value, benefits, and revenue generating opportunities for the customer, and wherever possible, quantify value.
- Match machine to customer application, including accessories (bundling).
- Create, Need, Urgency, Interest and get a "corporate map".
- Establish a "rapport" with the customer and nurture relationships and network. "Create an inside sales force".

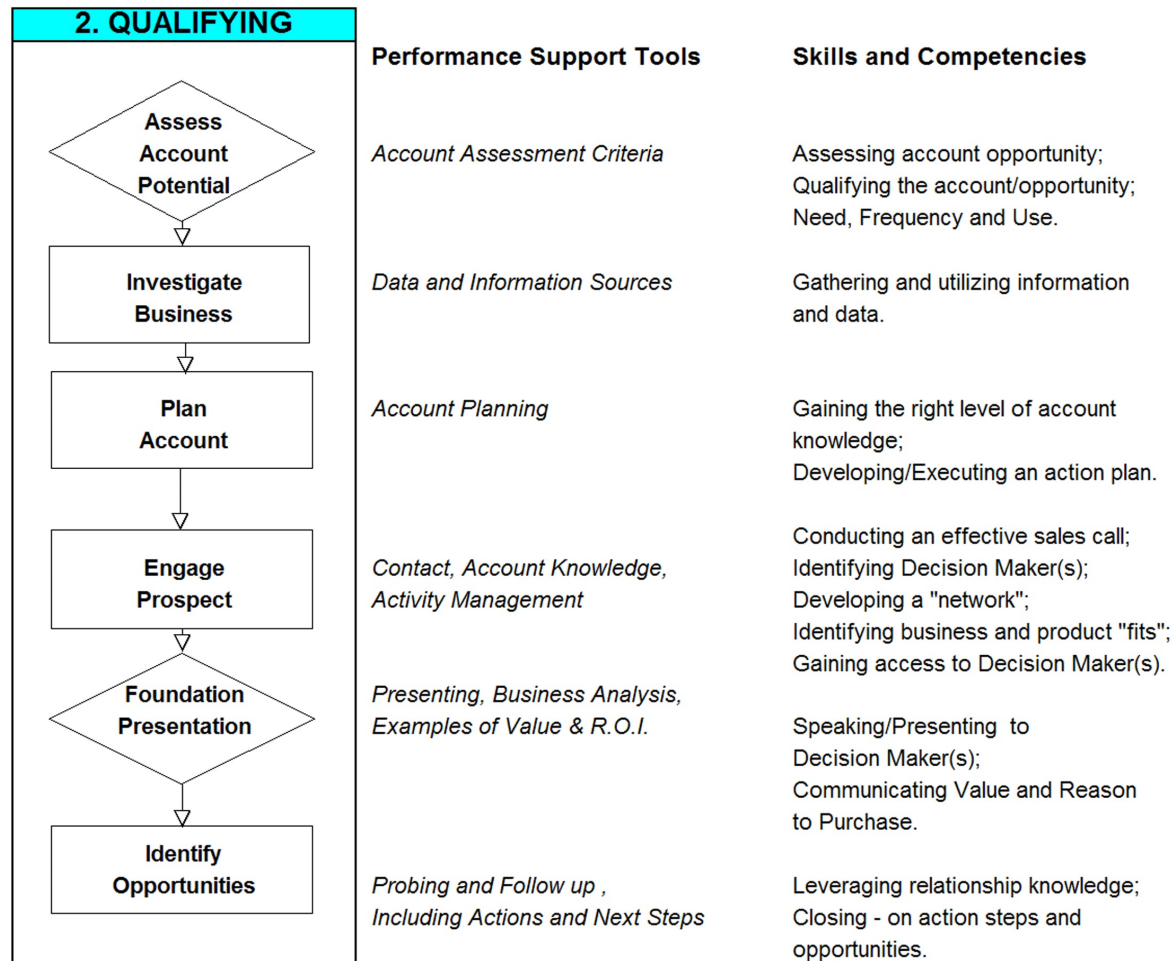
**Every customer contact is important- "three degrees of separation"**

**How is selling to these Accounts different from the traditional one-off customer?**

***Customer Acquisition - Customer Loyalty - Customer Retention***

- ▶ True “consultative selling” approach, it is an ongoing, cyclical process.
- ▶ Partnering, working with the customer to find a mutually beneficial solution - Create a “win, win” situation.
- ▶ Requires a strategy and a plan that has to be implemented over time.
- ▶ Requires an investment in time, and may require financial resources.
- ▶ Proactive sales approach versus a reactive sales approach.
- ▶ Need to do your “homework first”
- ▶ Deal with each customer as “unique” , avoid generic solutions whenever possible.
- ▶ Need to document everything. Better too much than not enough information.
- ▶ Every customer contact should end with “next steps”, actions to be taken, by the customer and ourselves.

***You are a Professional - To the customer, YOU ARE PowerMate®!***



## IDENTIFY AND UNDERSTAND THE TYPE OF ACCOUNT YOUR DEALING WITH!

- I A **KEY ACCOUNT** is a business opportunity where we sell multiple units (>20<100) through one Company/Organization that does all the purchasing from one location - **CENTRALIZED** - Typically, top down approach.
- II A **PROJECT ACCOUNT** is a business opportunity where we sell multiple units and the decision to purchase occurs in more than one location - **DECENTRALIZED** - Typically, bottom up approach. Sell location by location. -Need to define and get the main Contact to agree to support us e.g. Maytag, Brand Source, Nexstar (Associations, Buyers Groups, Dealer Networks...)
- III A **MAJOR ACCOUNT** is a business opportunity where we sell multiple units (>100) and is a top down, type of Account. e.g. Lincare (National Account)

*Having no plan, IS a plan to fail!*

Always need to:

**Listen and ask open ended probing questions, let the customer tell you about their business “Get the Map” of how the customer does business.**

**Build a long-term relationship as a “solution provider” offering the best value for money invested. REMEMBER - PowerMate® generates revenue!**

Must have a strategic plan, complete with a time line and utilize “**SMART**” objectives for each and every contact with the customer whether in person or on the phone.

**Specific; Measurable; Action-orientated; Realistic; and Time-bound.**

#### **PRE-CALL Routine:**

What is my “**SMART**” objective?

Who am I going to talk to?

Do I have everything I need to accomplish my objective in front of me?

Can I anticipate any questions that I should be prepared for? (asking & answering)

#### **POST-CALL Routine:**

Did I achieve what I set out to do?

What have I committed to, for the customer? When/How am I going to do it?

What could I have done differently? Better?

Update my plan and strategy...What are my next steps?

When does it need to be completed, how and by whom?

***To be successful you must know who your dealing with, how they do business, how they make decisions and illustrate why they NEED PowerMate®.***



## QUESTIONS THAT NEED TO BE ANSWERED...

### Customer Background:

How did you learn about us?

What prompted you to contact us Today?

Have you ever seen this type if equipment before?

Do you own a PowerMate® machine now? Have you ever?

Do you know anyone who does own a PowerMate® machine?

### Customer Information:

How do they do it now? Dolly? Competitor? *Suggestion: Show empathy, even surprise You do it like that?*

What problems or issues is the customer trying to resolve?

What made you decide to contact us? Savings, Safety, new application...

Do they need our machine? If so which machine(s) fits the customers application?

How many do they need?

What can they use it for?

Fleet size and type?

Number of potential applications?

Number of locations/branches?

Are you unionized? Non-unionized?

### “Are you interested in”:

Increasing productivity, efficiency and reducing labor costs?

Reducing on the job injuries and resulting compensation claims?

Reducing the manpower required to complete a move?

Presenting yourself to your customers in a professional manner?

Increasing both customer (CSI) and employee (ESI) satisfaction?

Reducing incidental claims to the product and customer premises?

A tool that ultimately adds to your companies' bottom-line and pays for itself in less than a year or many times over

Gaining a “USP - Unique Selling Proposition” or competitive edge or advantage over your competition?

Growing your business by realizing new opportunities, creating more referrals and repeat/sustainable business?

***Expressing “empathy” is a positive way to communicate to the customer that you understand and relate to their situation.***

## Frequency and Application:

How often do they use it?

How many do they need?

How many locations do they have?

What are they moving? Size? Weight? Dimensions? Center of Gravity? Special Needs?

What do they use it for? What accessories do they need?

What is a Typical Application? Commercial? Residential? Mixture?

Would the customer require product customization? (Engineering)

Are they located in an area we can easily access? Have representation?

## Decision Maker(s):

Who are/is the Decision Maker(s)? Do they all agree PowerMate® is the right tool?

Who do we have to get on side? Do we have all the decision makers?

Who influences the decision to purchase? What is the purchasing process?

Who ultimately signs the Purchase Order? Do they have the budget? Are they committed to buying from us?

What is our plan? What is our time line? When can we ship?

What are their Hot buttons? Safety, Productivity, Cost Savings, Revenue Generator?

Can you create your own inside “sales force”?

How can they help you achieve your objectives

**Decision Makers:** *Within a sale, there are different decision makers who make decisions about different aspects of the sale. “The final authority” makes decisions concerning return on investment ROI. The identified person makes decisions regarding performance characteristics and cost justification. “The negotiator” makes decisions about the value of the features versus the amount of money to be paid. “The end user” makes decisions about how easy it is to use the product/service. “The coach” makes decisions about your capability and credibility. “The recommender” makes decisions related to how helping you will provide him/her with better service and how it might strengthen certain relationships. One person can play more than one role and/or more than one person can play a single role.*

**Decision Makers in an Organization:** *A person in the prospect organization who has the power and budgetary authority to agree to a sales proposal. One of the most common mistakes by sales people selling to organization is to attempt to sell to someone other than a genuine decision-maker. For anything other than a routine repeating order, the only two people in any organization of any size that are real decision-makers for significant sales values are the CEO/Managing Director/President, and the Finance Director. Everyone else in the organization is generally working within stipulated budgets and supply contracts, and will almost always need to refer major purchasing decisions to one or both of the above people. In very large organizations, functional directors may well be decision-makers for significant sales that relate only to their own function's activities.*

***Ask as many open-ended questions as possible, listen, learn and understand.***

# Decision Makers

<b>Title</b>	<b><u>What Typically Motivates Them to Buy?</u></b>	<b><u>Role in D-M</u></b>
<b>EXECUTIVE:</b>		
President, CEO	<b>R.O.I. - Payback Period</b>	Decision Maker
Owner	Save Money	Negotiator
Partner	Increase Productivity/Efficiency	End-User
District Manager	Reducing Injuries / Increasing Safety	Recommender
Regional Manager	Reduce Damages	Coach
Branch Manager	Save Money	
General Manager GM		
<b>PURCHASING/PROCUREMENT:</b>		
VP Purchasing	What their people want	Decision Maker
Purchasing Director/Manager	Competitive alternatives	Negotiator
Buyer	Save Money	Recommender
Purchasing Agent	<b>R.O.I. - Payback Period</b>	Coach
<b>OPERATIONS:</b>		
VP Operations	Increase Productivity/Efficiency	Decision Maker
Plant Manager	<b>R.O.I. - Payback Period</b>	Negotiator
Operations Director/Manager	Save Money & Time	Recommender
Facilities Manager	Reducing Injuries / Increasing Safety	End-User
Distribution / Logistics Manager	Reduce Damages	Coach
<b>FINANCE:</b>		
VP Finance	<b>R.O.I. - Payback Period</b>	Decision Maker
CFO	Save Time and Money	Negotiator
Comptroller	Increase Productivity/Efficiency	Recommender
Accountant	Reduce Damages	End-User
Business Analyst	Reducing Injuries / Increasing Safety	Coach
<b>ENGINEERING / DESIGN:</b>		
VP Engineering	Increase Productivity/Efficiency	Decision Maker
Engineer		Negotiator
		Recommender
		End-User
		Coach
<b>HEALTH &amp; SAFETY:</b>		
Safety Committee Member	Reducing Injuries / Increasing Safety	Decision Maker
Safety Manager	Save Time and Money	Negotiator
H.R.		Recommender
		End-User
		Coach
<b>OTHERS:</b>		
Project Director/Manager	<b>R.O.I. - Payback Period</b>	Decision Maker
Program Director/Manager	Save Money & Time	Negotiator
Misc. Manager/Director	Increase Productivity/Efficiency	Recommender
Marketing & Sales	Reducing Injuries / Increasing Safety	End-User
Customer Service	Reduce Damages	Coach

***EARN the Relationship and Respect of your Customers.***

## **Purchasing, Proposal and Payment:**

What is the customers purchasing process?

What is the timing of the purchase?

Is purchasing Centralized or Decentralized?

Do they have resources to buy today? If not, When?

Do they require a quote/proposal?

Do they require financing?

What are the payment arrangements/ terms?

Do they require promo materials, Fax, E-mail, Testimonial? Product Spec's? Videos?

Refer customer to Web site first!

Have you completed a business case or business proposal? To substantiate ROI hopefully in less than 1 year?

Are we looking at a phased implementation over time? How many units? Starting when? Use to establish a forecast "QF"- Quote Forecast. **Use 30/60/90...**

## **30/60/90**

Overall Objective: *Close the Sale this month!*

### **DECISION-MAKERS**

1) Do we have all of them?

2) Do they want it?

***One-third 33%***

### **MONEY**

3) Do they have the money?

4) Can they spend it?

***One-third 33%***

### **DELIVERY**

5) Will they give us an order this month?

6) Can we ship within 30 days?

***One-third 33%***

## **CRITERIA FOR % CLOSE OF A SALE 30%; 60%; 90% IN ANY COMBINATION**

### **Qualifying Questions:**

- 1) Besides yourself, who else is necessary to make the decision to purchase?
- 2) PowerMate® ranges between \$1,500 and \$5,000. Would it be an outright purchase, or is it something that you have to budget for?
- 3) Assuming that PowerMate® proves to do the job, are you looking to get one right away? Or is it something that you will be getting in the future?

***NEVER make assumptions; If you are unsure ask!***

# SUCCESSFUL CUSTOMER TELEPHONE CONTACT & PROSPECTING

**1) Identify yourself and what we do...**e.g. Hi I'm Paul from PowerMate®, we're a manufacturer of motorized stair climbing hand trucks and LiftGates...

**2) What is the ultimate benefit or result we deliver?** e.g. to assist you in moving heavy and awkward items with the goal of reducing injuries, costs and increasing your companies profitability.

**3) Establish Need, Frequency, Use** - ask open ended questions; establish how they do business today... Refer to "Priorities"- Account secondary screen e.g. What are you moving? How do you move them today?, How often does that happen...? Empathize with customer. Obtain a description of what is they want to move including the approximate size and weight. What is there scope of work?

**4) Identify decision maker**, e.g. Are you the person responsible for making the decision to purchase? If not you, can you direct me to the person who does?

**5) Provide the customer with a solution** e.g. M1 - Sell using various support materials - feature - benefit, Info package, third party success stories... Refer - Sales Binder

**6) What are my next steps?** e.g. Action(s) to be taken...If I courier an info package to you today, is Friday morning at 9:00 am a good time to follow-up with you?

## PowerMate® Sample Scripts:

### A) "Generic" Prospecting:

Hi Mr. Smith, I'm Dennis from PowerMate®, we're a manufacturer of motorized stair climbing hand trucks which assist you in moving heavy and awkward items. Our PowerMate® will reduce injuries, costs and increase your companies profitability! If I've caught you at a good time, I'd like to discuss your situation / ask a few questions to see if this is something you'd like more information on / would you like to take a look at / would be of value to you and your company.

-Have you seen this type of equipment before?

-Does that sound like something you'd be interested in?

-Do you have the need to move things today? How do you do it?

-Are you the person that makes those decisions? If not; Can you direct me to that person?

***If we cannot demonstrate VALUE, there is no sale!***

**B) “Industry / Segment Specific”:** e.g. Plumbing / HVAC Business:

Hi Mr. Smith, I'm Dennis from PowerMate® - We're a manufacturer of motorized stair climbing hand trucks which assist you in moving heavy and awkward items like hot water heaters, brine tanks, water conditioners, A/C motors and compressors, sewer cleaning equipment, furnaces, and boilers up and down stairs, on and off vehicles and across rough terrain. We have supplied customers in your industry with solutions to their moving needs for more than 30 years. Solutions that have not only saved our customers money but, generated revenue that can be directly applied to your bottom line! If I've caught you at a good time, I'd like to learn more about how we can help your Company / ask a few questions to see if there is an opportunity for PowerMate® to save you money and generate revenue for your Company/ would be of value to you and your Company.

Are you the person that makes those decisions? Can you direct me to that person?

**C) “Project Specific” - Strategic Alliance or Partnership**

***“We have something in common”***

Hi Mr. Smith, I'm Dennis from PowerMate® - Were excited to be a new Nexstar Preferred Vendor! Have you had an opportunity to use the link provided on the Nexstar Preferred Vendor page, to visit the PowerMate®/Nexstar Web Site?

Yes or No...

“Yes” Then you understand the potential for PowerMate® to help save your business money...

“No” Do have the time and ability to go to our Web site with me now?

Yes and or No -

To give you a little background, Nexstar was brought to our attention in November of 2004 by one your members, Randy Arnold. He has been using PowerMate® to generate revenue for his business for the past 5 years and there are many others like Randy!

We have been excited in our dealings with Nexstar and Mr. Scott Pearson. Nextar's commitment to it's membership, their belief in the value of training, their business philosophy and concept of long term partnering is consistent with how we at PowerMate® conduct business. For us it was a perfect fit! We see our association with Nexstar and it's members as a win, win scenario for all involved.

You don't have take my word for it, check out our Web site, listen to what other Nexstar members say about the value and importance of investing in a PowerMate®!

When the customer sees the value in PowerMate®, attempt to close the customer. If you require another contact with the customer, that's a good time to complete or arrange a later phone call, to work through a “business case” **with** the customer. Quantify how we can save the customer money and add value.

***Challenge yourself to view an opportunity from different perspectives-***

***“THINK OUTSIDE THE BOX.”***

## FEATURE / BENEFIT SELLING

If you state a feature or value item we offer our customers, we also need to highlight the specific benefits to the customer. Think of it in terms of: **“Because of ...You can...”**

**SINGLE POINT OF CONTACT** - We offer you one dedicated sales and service contact, with years of experience in your industry. We make every attempt to understand your business and provide you with an experienced, professional sales and service support contact.

**SAFETY FIRST** - Safety is one of PowerMate®s greatest attributes! Not only will you reduce your exposure to costly injuries but, you will operate more efficiently (less men required) and require less effort - increasing productivity through reducing fatigue.

**SUPERIOR POST SALES AND SERVICE SUPPORT** - We view our relationships with our customers as “partnerships” We pride ourselves in working with customers long after the initial sale is completed. Offer a Service Agreement.

**INDUSTRY SOLUTION SPECIALIST** - PowerMate®s are our only business. We have over 35 years experience in providing solutions for customers like you; in the Plumbing, HVAC-R Industry.

**GENERATES REVENUE FOR YOUR BOTTOM LINE** - Let us show you how an investment in PowerMate® can generate revenue for years, adding to your Company’s bottom line! Ask us how!

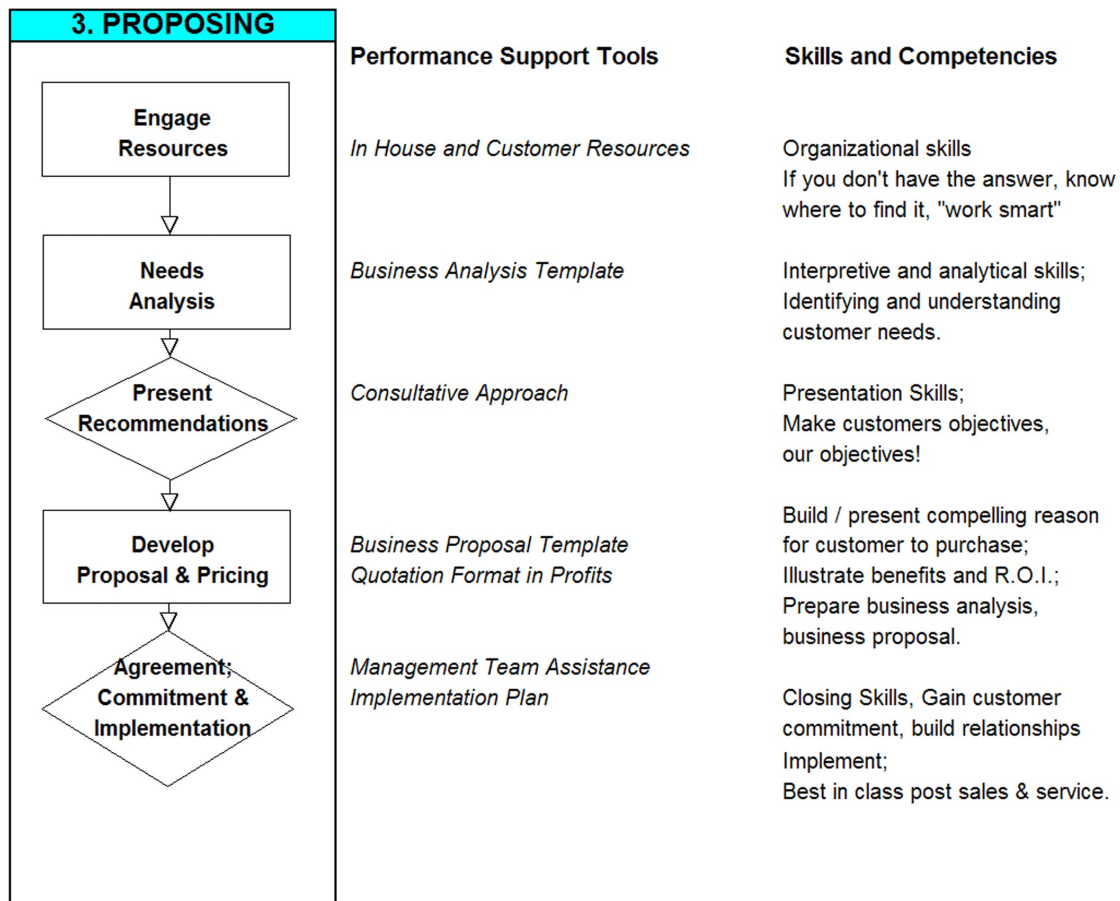
**FINANCING OPTIONS** - We accept American Express, MasterCard, Visa, negotiated terms and can even offer you financing for a 12/24/36 month period\*! Long and short terms Rentals an option? Incorporate PowerMate® purchase with new vehicle and make and operating expense, a possibility?

**INDUSTRY LEADER** - Comprehensive operator training with over 5 programs to choose from!. You even have the option to have a certified PowerMate® Trainer come and train your staff, at your place of business, to ensure you realize the maximum benefits PowerMate® has to offer! All PowerMate® trainees receive a certification card.

\* for approved customers

***Do your Homework! The more you can show you understand the customer situation, the more successful you will be.***





### Sales Account Resources:

We are here to make calls with you; Consult with you; bounce ideas off; provide alternative ways to look at challenges / opportunities.

Working with Accounts may require:

Assistance with Strategies/ Planning/ Forecasts and Customer Proposals.

Marketing support, web searches, programs, mailers...

Customer Service - for customer service/technical related issues.

If you're not sure...."Let me talk to the management team here and I'll get that answer for you."

All external customer communications needs to be reviewed by the Sales Team Leader prior to sending. A second set of eyes never hurts!

***KNOW your Customers.***



## **Pricing, Discounting & Negotiating:**

To be in a position to negotiate, always start at full tariff and go from there - do not offer non-sanctioned discounts - first. Discount only what you need to get the business.

We are selling a concept - PowerMate® is an investment that pays for itself in 3 months and generates your Company a revenue of \$1,200/month, for the next 7 years.

Treat “like customers alike” - customers talk to each other.

Understand the difference between us and competitive machines, be prepared to highlight why PowerMate® is the correct solution.

“Based on your order, we can see if we can do any better. Let me talk to the management team for you...

If you discount a sale of one machine, what will you do when the customer orders 2 machines, 5 machines, 20 machines?

If the customer understands our full tariff pricing he will be more appreciative of his discount. Discounts should be used to recognize the customers ability to “sweeten the pot”. For example; multiple machines, advantageous payment terms, centralized ship to addresses...

### **“Taboo’s”:**

Not talking to the decision maker or assuming that the person you are talking to is the decision maker. One of the most frequent mistakes we make is assuming the person contacting us is the decision maker. We can verify who the decision maker is by asking questions like; Are you the person responsible for making the decision to buy? Are there others? Who are they ? Can you describe how and what you move today?

Never talk specific pricing until you have developed a “Complete Plan” including, documenting the way the customer does business, presented a solution, completed a business analysis and can quantify customer savings. Lead the customer and follow the steps to a sale process!

Do not sell solely based on price - Sell Value!

***CRM = Customer Relationship Management***

Exchange of information should be addressed using the PowerMate® web site. Don't send a Business Analysis form to the customer until you have discussed it with the customer and make arrangements to work through it **with the customer**.

If the customer has an objection, understand the objection and deal with it first. Ask questions, ask for an explanation.

If the customer has an immediate need take care of that need first and then, resume selling.

Never mention our competition or speak poorly of them. If the customer asks a question about our competition, answer the question not based on what they do or don't do - but **highlight what we do, and why we are the right solution**.

## FILLING "THE VALUE BUCKET" FOR THE CUSTOMER

### 1. MARKETING

*Demand Generation:  
Find potential customers and help them become aware that we are valuable to them.*

### 2. QUALIFYING

*Understand the customer's business well enough to:  
- Help their decision makers  
Understand the business problems we could solve for them.*

### 3. PROPOSING

*Understand the customer's application requirements well enough to:  
- Match the right machine for their application.  
- credibly demonstrate our solution is best for their needs.  
- Show R.O.I.*

### 4. IMPLEMENTATION

*Helps the customer achieve the business results they expect through our products and services.*

***R.O.I. = "Good Business Decision = SALE!"***

## CUSTOMER BUSINESS PROPOSAL FORMAT

**i) TITLE PAGE**

**ii) TABLE OF CONTENTS**

**iii) EXECUTIVE SUMMARY**

The highlights; Why do they need PowerMate®, Why are we the right solution and quantify benefits

**1) BUSINESS NEEDS ANALYSIS:**

"The opportunity" - Define - How they do business today, corporate mapping

What prompted them to contact us?

How have we made their objectives, our objectives?

**2) BUSINESS ANALYSIS:**

"The Solution" - PowerMate® the right tool

1) COST SAVINGS

2) PRODUCTIVITY & EFFICIENCY

3) SAFETY

4) OTHER CONSIDERATIONS / BENEFITS

5) SUMMARY OF SAVINGS & REVENUE GENERATION

**3) IMPLEMENTATION:**

TIMING, implementation schedule, activity time lines, next steps

**4) PROPOSAL:**

QUOTATION (pricing)

TERMS & CONDITIONS (payment, shipping...)

**5) COMPANY INFO -**

Company History, Background relevant applications

Special Programs

**iv) APPENDICES: (Depending on specific customer need)**

Machine Specifications

Letters of Reference, similar applications

What makes us Different - Our Feature / Benefits

Machine Manual

Support materials; Videos, CD's...

***Position yourself as a “Solution Provider” make the customers objectives,  
YOUR objectives.***

## **“SAMPLE” CUSTOMER BUSINESS ANALYSIS**

### **2) THE OPPORTUNITY\*:**

Today, XYZ Company is the largest supplier of water treatment chemicals in the world and, the most expensive service provider.

In order to support XYZ Company's new Sales and Marketing objectives the Company is interested in ways to maintain their market share in the small to mid-sized businesses segment by providing, a more cost effective solution, at the same time, considering opportunities to increase productivity, EFFICIENCY, employee safety and reduce costs.

Typically, the water treatment solution is delivered to the Customer premises via; 34 ft van-trailer c/w lift gate; 45 ft van-trailer and 24 ft flat beds that are equipped with cranes.

Depending on the Delivery Specialists route, they would make approximately 8-12 stops per day. The frequency of the routes are daily, most routes having dedicated Delivery Specialists. The number of routes currently established in the USA are estimated in the 80-100 range.(\$23-25/hr) Deliveries that are often located in hard to reach locations like roof tops and basements. In these locations, many Customers have tanks/reservoirs with a maximum capacity of either 30 or 75 gallons.

Today, XYZ Company is using a "Micro Transporter Cart" that requires one Delivery Specialist to affect the delivery. The cart includes a 15 gallon mini-container, an attachment for the nitrogen bottle (28"x 8" dia.), regulator and hoses on the machine. The nitrogen bottle, regulator and hoses are mounted to the side of the machine and necessary to transfer the water treatment solution from the supplier mini-container to the customers tank.

Currently, this requires one trip up and down stairs and service elevator, transporting a 15 gallon container. In the case of a customer with a 75 gallon tank, this necessitates either multiple trips (2-3); or a greater number of customer visits.

\*Above is information collected through discussion with various XYZ Company personnel: Teddy Jones, Dan Black, Martin Smith.

### **THE PowerMate®® SOLUTION:**

For this XYZ Company application, L P International (PowerMate®) recommends a LE-1 model, the same as the machine you purchased and have at your Centerville location. For the LE1 the maximum weight recommended for a safe one person move for stair climbing is 600lbs depending on the center of gravity (Please refer to load charts attached).

We need to work with our engineering departments to incorporate the addition of an extended toe plate and the addition of an attachment to accommodate both the 55 gallon drum and; the nitrogen bottle c/w regulator and hoses, respectively.

**WORK SMART - Use the resources available to you within our Company.**

### 3) COST SAVINGS:

With the PowerMate® LE-1, XYZ Company can transport a 55 gallon drum rather than the 15 gallon container currently used thus, reducing the costs to the customer from \$166.66 per gallon to \$54.54 per gallon consistent with your Marketing and Sales objectives!

#### **That's less than one-third of the current cost!**

Another benefit of the potential reduction is the number of trips, or a reduction in the frequency of trips required to service a customer with a 75 gal tank / reservoir. For example, using the current micro-cart (15 gal. capacity) may require 2 to 3 trips up and down from their delivery vehicle to site of the customers tank / reservoir. If 50% of your customers have 75 gallon tanks, this would result in the result in eliminating one trip @ 15 minutes per stop time savings.  $100 \text{ routes} \times 250 \text{ bus. days} = 25,000 \times 5 \text{ customers / day} = 125,000 \times 15 \text{ minutes time savings} = 1,875,000 / 60 \text{ min} = \mathbf{31,250 \text{ hours per year @ \$24.00/hour} = \$750,000/ \text{ year}}$

Cost Avoidance: Using PowerMate® can protect your employees from injury, resulting in a potential savings, based on industry averages of \$58,000 / year1.

Reduces the incidence of claims resulting from damages to the customers premises, you have 100% control of the load at all times.

By using PowerMate® some Companies have approached their Insurance Companies and other Government support agencies seeking a reduction or supplements to reduce the cost of acquiring a PowerMate® machine . e.g. In some instances the Insurance Company will pay for up to 50% of the price of the machine. Worker's Compensation Board has subsidized in Ohio 80% of price of a PowerMate® machine to prevent accidents.

### **PRODUCTIVITY & EFFICIENCY:**

With PowerMate®, the amount of time and effort required to go up or down stairs versus the machine you are using now, could be reduced greatly, adding directly to your bottom line or, allowing your Delivery Specialist to make additional stops per day!

e.g. If you have 100 routes and each Delivery Specialist can make one additional stop per day as a result of time savings 5-10 minutes per stop (a time savings of 5 minutes per stop x an average of 10 stops per day= 50 minutes per day) with PowerMate®, that's 100 customers per day, 500 per week, apx. 2,000 per month, or 25,000 customers per year!  $(25,000/10 \text{ stops per day}=2,500 \text{ daily routes}) (\text{days avg } 7.5 \text{ hour day} \times \$24.00/\text{Hr} = \mathbf{\$180/\text{day} \times 2,500=\$450,00 \text{ per year, 10 minutes per stop}}$

**\$900,000/ year!**

### **SAFETY:**

All PowerMate® models are ergonomically designed to reduce the incidence of back and strain related injuries.

An independent Study by "*Stuart Ergonomics*" found: "The PowerMate® line of hand-trucks is a much safer alternative to conventional hand-trucks and dead-lifts. The risk of injury is greatly reduced when properly operated. Shear forces, which have been indicated to be particularly damaging to the spine are reduced by at least ten times.

***Make every attempt to "Build your own inside sales force"***

Using conventional methods will subject the body to very damaging forces which exceed N.I.O.S.H. limits by almost two times. It is these reduction in forces which allow the operator to expend less energy to perform their task, and greatly reduced risk of injury and fatigue”.

"Industry estimates suggest that 75%, or more, of workplace injuries are back related. The medical bills and lost time work costs U.S. industries \$20 billion annually. Investing in ways to migrate these costs and reduce absenteeism is more than just an ideal, it's an economic reality”.

#### **US Dept. of Labor Statistics:**

WORK PLACE INJURIES COST - The average cost resulting from a disabling injury (non-fatal), including employer costs (direct and indirect costs), is **\$29,000 per incident**.

That the incidence of back injuries is 2.8 / 100 therefore, we can assume that PowerMate® **could save/avoid a minimum of 2 injuries per year -**

**a savings of \$58,000 / year.**

#### **OTHER CONSIDERATIONS/BENEFITS:**

Investing in PowerMate® gives XYZ Company a competitive point of differentiation, in other words, a unique selling advantage versus your competitors.

By reducing the cost per gallon, consistent with the new Sales and Marketing objectives.

#### **4) SUMMARY OF PowerMate® POTENTIAL SAVINGS\***

PowerMate® cost savings: If 50% of your customers have 75 gallon tanks, this would result in eliminating a minimum of one trip, a minimum savings of 15 minutes per stop, an estimated cost savings. = **\$750,000/ year**

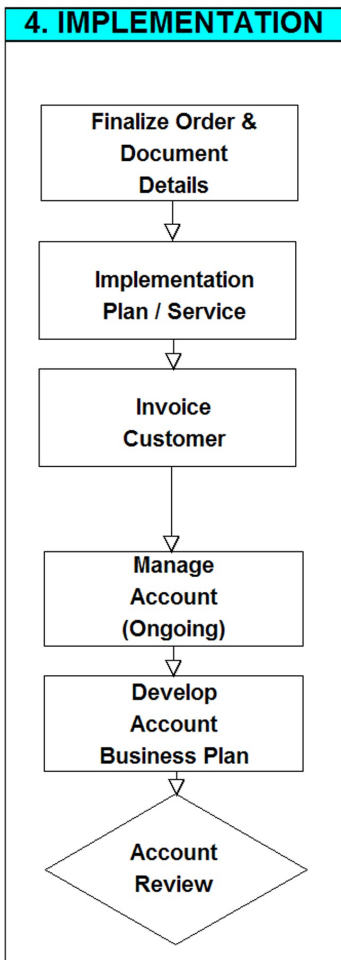
When PowerMate® proves to save you 5-10 minutes per stop, labor savings through increased **EFFICIENCY: estimated: \$450,000/ year; 10 minutes per stop estimated: \$900,000/ year!**

"cost avoidance" of injuries: **estimated: \$58,000/year**

**TOTAL ANNUALIZED SAVINGS/REVENUE GENERATED FOR THE XYZ Company COMPANY IN THE FIRST YEAR ALONE, FOR THE OUTLINED APPLICATION IS: \$1,708,000!**

\* This is the key information that would be presented in the “Executive Summary Section of the Customer Proposal.

***Keeping and developing business, is as important as acquiring new business.***



#### Performance Support Tools

*Profits and In House Support*

*Implementation Plan Template*

*Finance and Traffic Department*

*Partnering Concept  
Profits*

*In House Support  
Profits*

*Measure Results against Plan  
Profits*

#### Skills and Competencies

Order Entry - Profits  
Detail, complete, accurate and timely  
Closing skills

Time Management skills  
Customer "buy-on"  
Planning and Forecasting (profits)

Terms and Conditions  
Detail, complete, accurate and timely  
"Good" decision making

Monitoring and Reporting skills  
Business Analysis skills  
Relationship/ People skills  
Identify other/new opportunities  
Networking

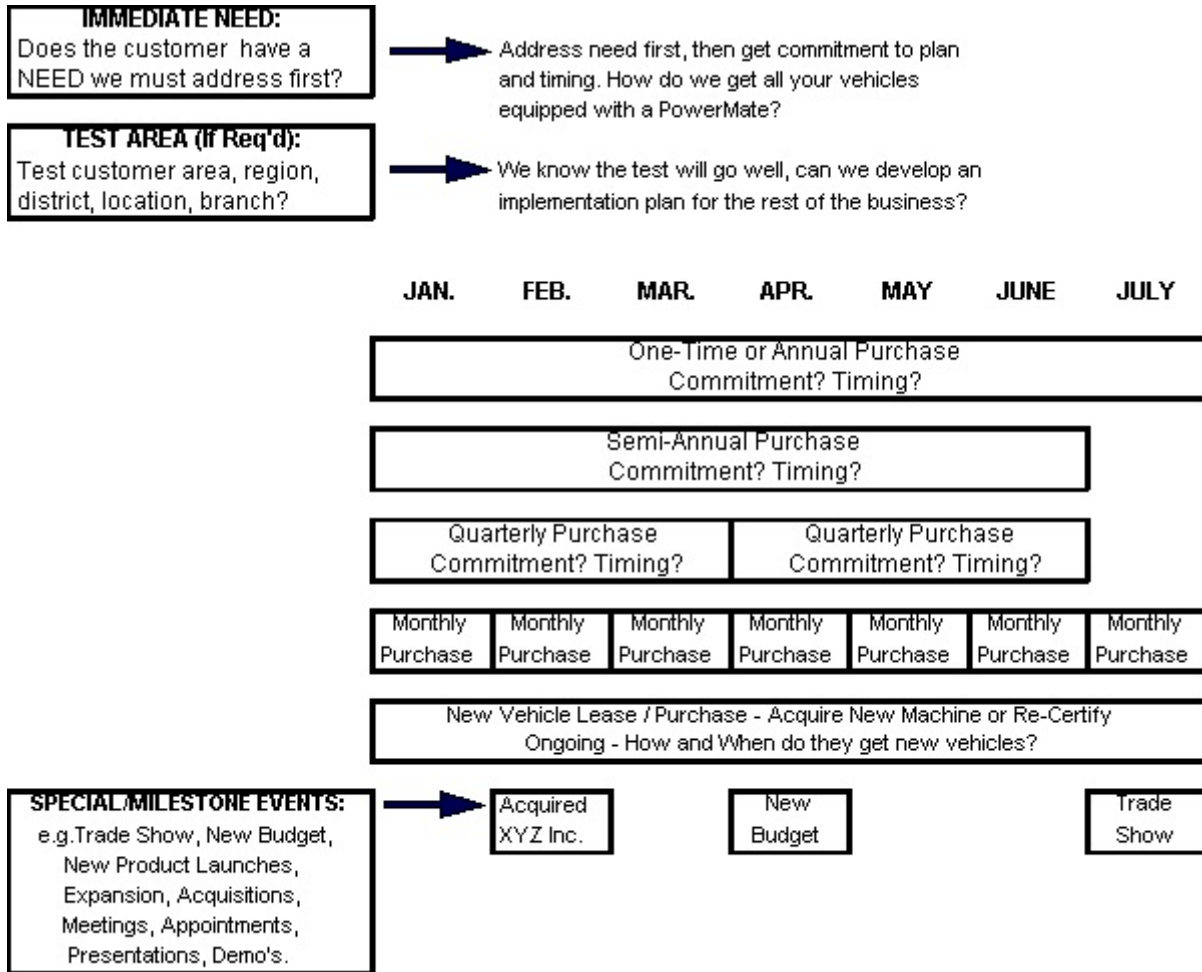
Organizational skills  
Time Management skills  
Strategic Planning & Forecasting  
Tactics to support objectives

Monitoring and Reporting skills  
Business Analysis skills  
Relationship / People skills

***Gain Customer Involvement through agreement and commitment.***



## CUSTOMER ACCOUNTS: TIME LINES AND IMPLEMENTATION



- ◆ Listen, understand and question “how” the customer does business.
- ◆ Find opportunities to “fit into” the customers process and programs.
- ◆ Always think in terms of obtaining ALL the customers business. Everything should be incremental to achieving that goal.
- ◆ Develop a plan and work with the customer to develop solutions that will position us as a business partner, solution provider.
- ◆ What do we have to do to make PowerMate® your Corporate Standard?
- ◆ What can you commit to today? What other timing can the customer commit to?
- ◆ Who else in your Company do we have to get onside?
- ◆ Ask yourself: How can we make the customers objectives, our objectives?

***Have a plan and always document your next steps!***



## **CUSTOMER CASE STUDIES**

### **CUSTOMER CASE STUDY “A”**

**“I need a Demo!”**

### **CUSTOMER CASE STUDY “B”**

**“I need a Price!”**

### **CUSTOMER CASE STUDY “C”**

**“Why do I need PowerMate® Training!”**

***Become a “Specialist” in your Market Segment.***

## **CUSTOMER CASE STUDY “A”**

### **“I need a Demo!”**

Hi, My name is Elaine and I’m the District Manager for XYZ Company. I found PowerMate® on the internet. Last week, I had one of your competitors in to give me a demo and based on what I have seen, I think PowerMate® may be a better solution for my Company. Can I schedule a demo to see your machine?

Wow, that’s great! I’m curious, what impressed you about our machine? Can you tell me a little about your business so that I can match the right PowerMate® to your application? Continue to ask probing questions...

Based on our conversation, the right solution is the P2, and you’ve identified that your district has the need for 2-3 machines. I can see that you see the value in PowerMate® as we do! We would like to support your objective of making PowerMate® the National standard for your Company. How do we make that happen?

So, there are 47 other districts similar to yours, across the US, that face similar challenges to your own. I’d love to do a demo for you, as a first step can you provide me with pictures and weights of the items you are moving. We will recreate the loads here, shoot video, complete a business case detailing the benefits of PowerMate®, and with your help, send a joint e-mail to all your district managers across the country. Then we’ll schedule a demonstration at a location that is beneficial to the entire Company. Is this consistent with your objective as making PowerMate® the national standard for your company?

Great! I look forward to working with you over the coming months, I am really excited about making this happen, for both our Companies! It truly is a win, win situation!

## **CUSTOMER CASE STUDY “B”**

### **“I need a Price!”**

Hi my name is John and I’m with the Superior Appliances, of Kentucky. I’d like a price on a PowerMate® machine to move my appliances, can you help me?

No problem, I can help with that!

We have 27 machines and 4 different machines for the appliance industry.

How did you learn about PowerMate®?

I need to understand what your application is to match the right machine for your application...Type of appliance(s), frequency, vehicles...

***Credibility and trust are earned and can be lost in a second!***

**NB - Don't offer the right machine until you are able to show value!**

What is the main purpose for inquiring about a PowerMate®? Labor? Savings? Damages? What problem are you trying to resolve?

Use third party success stories, testimonials... I have a customer (a 100lb lady) who moves side by side freezers by herself with a PowerMate®! Many of our customers in your industry view PowerMate® as an investment not a cost.

### **IF CUSTOMER STILL DEMANDS A PRICE...**

Customer: "that's fine I need a price"

A. I would like to work up the number for you and get back to you if that's okay.

Customer: "that's fine I need a price"

A. If you need a price the range is from \$1,500-\$5,000.

Customer: "that's fine I need a price"

A. I need to understand your needs so I can match the right machine you require to accomplish your business objectives! Can you help me understand...

So John, you are interested in reducing your labor costs. Based on our experience, the average Appliance customer saves an average of \$10,000 per year using PowerMate®, that's \$50,000 over an average 5-7 year machine life expectancy! Would you consider your business as representative of the appliance industry? (Get customer buy on, if responds in the negative, "What is different about your business - help me understand?

If I recommended a \$3,500 solution would that be within your budget?

How would you like to pay for the machine? (Present financing as a solution if required).

Can you decide today or are there others that need to be brought on board?

If there are others, do you require a formal presentation? I can tell that you see the value in PowerMate®, what can I do to help you convince the other decision makers?

Closes and trial closes ( "trial closes" can happen frequently throughout your conversation with the customer - If you close the customer stop selling and take the order!)e.g.

If you have your credit card number and FID , I can ship the machine today!

If you agree that we can save your Company \$10,000 per year, why can't we write up the order today?

Can you give me your PO and FID number so I can ship your PowerMate® today?

**Always approach the customer with a "How can I help you attitude."**

## **CUSTOMER CASE STUDY “C”**

### **“Why do I need PowerMate® Training!”**

**Sample Price Objection:** Customer; "Training is too expensive"

Training is not a "PROFIT CENTER". We are not in training to make money. The average cost for a training is ~\$500.00. "Training is not an "up sell" it works, it's proven and we believe in it"

PowerMate® is easy to use however; it is "unique". For \$800.00 we will fly a qualified trainer to your location, train two people, therefore, the average cost to train is only \$400.00 per person. We will work with you and your staff for an average of 2-3 hours to ensure that you and your Company realizes the maximum benefits PowerMate® has to offer. We will show you "tricks" we have learned over our more than 30 years in business. We will move actual loads and certify your trainers. We leave when everyone is confident in and comfortable in the operation of the machine.

PowerMate® is an investment; that generates revenue for the customer, don't want it in the corner collecting dust, want it to be used!

#### **A Matter of Perspective:**

"You are prepared to invest \$3-4,000 in a PowerMate® because you believe in it; Why wouldn't you want your people trained on it"?

"Would you fly four people here to be trained for free"?

"Are you comfortable having your people move a 400-600+ pound load up and down stairs without training"?

"Have you taken training courses in the past, what did they cost"?

#### **Third Party Success Stories: Customers say...**

"Customers that have opted not to have training including Mechanical Engineers, even NASA Engineers. After receiving their PowerMate®s they have called us back and asked us to come in to do training, like many customers, often at a greater price than what we have quoted you today! They appreciated the value in training".

#### **Competition: Not about what they don't do; IT'S ABOUT WHAT WE DO!**

"Our comprehensive on-site training is what differentiates us from our competition and makes us unique, a leader, in the industry. We are all about building relationships, we do not ship the machine and disappear".

#### **Reality: What if...?**

Customer; "My guys will figure it out"

Answer: "What if they don't? Or worse yet, what if they THINK they figured it out and product is damaged? Damage is done to the customer's premises, or worst of all; someone gets hurt? Are you prepared to take that risk"?

***Conduct Business with a “CUSTOMER FOCUS”***

### **Anecdotes: In my experience...**

Customer; "Why do I need training"?

Answer; When I started with PowerMate® they gave me a demo, put a load on the machine and asked to move it up the stairs. I couldn't and I consider myself mechanically inclined. Once I was shown It was a piece of cake

Customer; "Do we have to have training"?

Answer; "We view training as essential/necessary based on our experience..."

"Customers who where skeptical about training and received it, have called us back to thank us!" They learnt that training is not an expense, it is an investment"!

### **Analogies:**

Customer; "Why do I need training you said the machine was easy to use"?

Answer A - "I like to compare using a PowerMate® to riding a bike, it takes a while to learn once you get the hang of it, its very easy to do and you never forget".

Answer B - "Driving an automatic car is easy. Would you let your teenager drive on the Interstate without any training, a license"?

## **SUMMARY OF WAYS TO OVERCOME TRAINING OBJECTIONS:**

- 1) Third Party success Stories - "Many customer have found..."
- 2) Use your own experience - "It has been my experience that..."
- 3) Put the price objection into perspective: understand why they object to price!
- 4) Analogies - Stories that relate the message we are trying to convey to the customer in a practical manner.

We encourage you to draw from the concepts provided above. Modify, customize them, change them, add to them, develop responses that work for you and that you feel suit your style!

### **Other Thoughts on Dealing with Training Objections:**

It is very important to understand why customers objected to the price of training in order to overcome the objection; even it means asking the customer for more detail.

PowerMate® training is CRITICAL, PowerMate® is unlike anything that the customer may have used before.

***PowerMate® is not a cost, it is an INVESTMENT!***

"PowerMate® is unique. In many ways, to operate the machine is opposite of what you have been taught on a traditional hand truck. Even today, after 30 years in business we are still learning"!

Without training, using a PowerMate® can be intimidating even scary to use.

If it is not used, it is not in the best interest of PowerMate® or the customer. Bad word of mouth advertising and the perception that the machine does not do the job can be very hard to reverse.

If a customer is trained they will remain loyal. If they are loyal they will buy from us again, order new machines, parts, re-training and re-certification.

**You must believe training has value to sell it!**

**VALUE** = You will be comfortable with the machine and operate it effectively, efficiently and safely.

***\*\*\*If you BELIEVE IN TRAINING, and HAVE CONVICTION, YOU WILL SELL IT\*\*\****

# Customer Focus Process

