



## RIGHT-SALES® TRAINING

**Class Name**  
Right-Sales 2-Day Training

**Class Description**  
2-day training program that teaches you how to use Right-Sales®.

**Class Mission**  
Enable individual to use Right-Sales® as an in-home selling tool.

### CLASS OUTLINE

#### DAY ONE:

##### 1. Overview

- A. The power of integration and using the wizards
- B. The ability to design, sell and estimate a job
- C. Automated proposals and costing tools
- D. Tracking your sales

##### 2. Creating a Template

- A. Template wizard
- B. Contractor information
- C. Creating easily-identified building conditions and descriptions
- D. System and distribution preferences
- E. Customer-friendly report packages

##### 3. Beginning the Sales Process

- A. Sales wizard
- B. Customer and job information

- C. Selecting appropriate libraries
- D. General load and drawing preferences
- E. Verifying project information
- F. Presentations

##### 4. Needs-Based Selling

- A. Questionnaire
- B. Goals of using the questionnaire
- C. Review of accessories-linked questions
- D. Review of general sales questions

##### 5. Fast and Accurate Loads with Right-Draw®

- A. Describe the building with Right-Draw®
- B. HVAC Shapes™
- C. Using the property sheets
- D. Creating a block load
- E. Adding multiple levels
- F. Verifying important information

##### 6. Selling Your Products

- A. Product information screen
- B. Selling comfort and features
- C. Adding products to the estimate

##### 7. Cost Comparisons

- A. Using the Blue Book tool
- B. Selecting equipment
- C. Selling with ROI and payback vs. selling monthly cash flow with Right-\$™

#### DAY TWO:

##### 1. Automated Proposals

- A. Proposal template
- B. Similarities to common word processor
- C. Inserting program variables
- D. Inserting pictures
- E. Saving and inserting text blocks
- F. Saving proposals
- G. Emailing proposals

##### 2. Setting Up Your Pricing

- A. Overview of sample pricelist import
- B. Parts library
- C. Setting up columns
- D. Preferred parts
- E. Editing and adding categories
- F. Editing and adding parts
- G. Adding and setting labor
- H. Assembly library
- I. Creating and manipulating assemblies

##### 3. Selling Accessories

- A. Accessory wizard
- B. Accessory selection

##### 4. Automating Estimates

- A. Automatic parts mapping wizard
- B. Mapping multiple items

##### 5. Fine Tuning Your Estimate

- A. Automatically mapped parts, toggling investments
- B. Adding sections, parts, assemblies, and items
- C. Re-mapping parts
- D. Setting up BOM checklist using templates
- E. Locking BOM

##### 6. Using the Sales Manager

- A. Creating employees, stages, and types of proposals
- B. Closing proposals
- C. Generating reports

##### 7. Duct Overview

- A. Using Right-Draw® for room-by-room calculations
- B. Setting CFM with equipment selection
- C. Setting static pressure
- D. Creating and setting duct system type
- E. Register and equipment placement
- F. Drawing the duct system
- G. Automatic takeoff