

**MSCA**  
IS PROUD TO INTRODUCE THE  
**SALES  
INSTITUTE**



**SALES INSTITUTE**  
MSCA University™

# ABOUT

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## MSCA UNIVERSITY™ SALES INSTITUTE

Introducing the first and only focused training program specific to service sales in the HVACR industry. This program, unlike any other, provides a clear career path for growing and developing service sales professionals to ensure their success, enhance their value to the company, encourage retention and, ultimately, increase sales. Nowhere else does such a comprehensive educational offering exist that focuses on your needs.

The Sales Institute will provide MSCA members with a structured, multi-level, multi-year training program for sales professionals in the HVACR industry. With ongoing pre- and post-assessments and feedback, participants will also have continued support as they progress in their careers.

MSCA has a longstanding history as the premier education association for mechanical service contractors in the HVACR industry. As demonstrated by our annual educational conferences, we are uniquely positioned to customize dynamic sales programs that are certain to become the industry standard. Developed specifically to meet the challenges of HVACR service sales, the MSCA University Sales Institute will give your company the competitive edge in cultivating an exceptional team.

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# DETERMINE WHICH PROGRAM IS RIGHT FOR YOU AND YOUR TEAM MEMBERS.

Now housing all of MSCA's sales programs, the Sales Institute has four phases that support all levels of service sales:

- **Phase 1: Sales Leadership Symposium**  
A program for sales team leaders
- **Phase 2: Sales Basecamp**  
Training for entry-level sales employees
- **Phase 3: Sales Masters I**  
A course for intermediate-level sales employees
- **Phase 4: Sales Masters II**  
An advanced program for experienced sales employees

The MSCA Sales Institute is designed to be of value to companies large and small – whether there are one or two sales professionals or an entire team. The skills and expertise acquired during these programs can also readily be applied to both maintenance and project sales.

# PHASE I

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## SALES LEADERSHIP SYMPOSIUM

The Sales Leadership Symposium is a full-day seminar for anyone who manages sales personnel. Presented by successful in-the-field industry experts, the Sales Leadership Symposium will:

- Provide the skills needed to recruit, hire, onboard, coach and train sales professionals
- Drive revenue growth and enhance profitability through a more structured sales approach
- Enhance sales team productivity and ensure employee retention
- Demonstrate the value of a clear sales training career path
- Provide access to a firsthand experience of the MSCA University Sales Institute
- Demonstrate the value that each sales training course will offer at all career levels

### **You should attend the Sales Leadership Symposium if you are:**

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- Service sales leaders who recruit, hire, train, and/or coach, even if you don't have a sales manager job title
  - Leaders who are committed to growth through service sales
  - Leaders who want to maximize the performance of their service sales team
  - Leaders who see the value in the continuing education of their sales team
  - Leaders willing to commit to the long-term development of their sales team
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# MAXIMIZE THE PERFORMANCE OF YOUR SERVICE SALES TEAM.

## Sales Leadership Symposium topics include:

- Developing a toolbox of management and salesperson resources so that you and your team have access to everything you need before you need it
- Understanding your role as “sales leader” and the vital role you play in ensuring the success of your team
- Hiring the right person and determining core competencies of each team member
- Successful onboarding and devising appropriate incentive plans
- The need for continuous tracking and benchmarking and providing ongoing feedback
- The “ins and outs” of effectively coaching and motivating your team
- Creating a culture of exceptional service, and ways to keep it fun and exciting to foster engagement

✓ *Those who manage sales personnel are recommended to attend this class before members of their sales team can participate in the Sales Masters program within the Sales Institute.*

# PHASE 2

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## SALES BASECAMP

Sales Basecamp is where it begins for entry-level service sales personnel. In this competitive and uncertain business landscape, the rules of sales and customer engagement have changed. This two-day program will prepare this recent hire with all the relevant skills necessary to confidently sell HVACR services while creating added value for the customer. Attendees will learn how to build long-lasting customer relationships that are vital for a successful career, how to efficiently and effectively prospect for results, the steps needed to prepare for that first critical meeting, and how to develop and present a finely-tuned proposal. Closing the deal is demystified with this course, and solid groundwork is laid for a heightened career in service sales.

### **You should attend Sales Basecamp if you are:**


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- A recent college graduate or service technician new to a sales position
  - New to the HVACR industry, but have some previous experience in sales in other industries
  - New to both the sales function and the HVACR industry
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# THIS PROGRAM WILL PREPARE YOU WITH RELEVANT SELLING SKILLS.

## Sales Basecamp topics include:

- Understanding the MSCA Sales Cycle and your career path success
- Building trust with potential customers and dimensions for building relationships
- Successfully maneuvering through the prospecting process and accurately profiling customers
- Preparing for and managing the first meeting with a potential customer
- Avoiding traps in proposal development and effectively linking features with needs
- Anticipating and handling objections professionally during the proposal presentation

 *Pre-requisites to attend this course: Completion of MSCA's HVAC 101 online course and completion of your company's onboarding activities so that you have an understanding of your company's value proposition and core competencies*

The Sales Leadership Symposium does not have to be completed in order for sales personnel to attend this course. Sales Basecamp is open to all member companies, and is an optional training.

# PHASE 3

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## SALES MASTERS PROGRAM OVERVIEW

The highly customized Sales Masters program is one that the HVACR and plumbing industry have yet to experience. With a curriculum designed by MSCA in-the-field experts in partnership with sales specialists from the University of Houston Sales Excellence Institute, this two-week program is perfect for service sales employees who often find it difficult to get useful training for their level of expertise specific to the mechanical service industry. The program comprises Sales Masters I and Sales Masters II.

### **You should attend Sales Masters if you:**

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- Have experience in service sales in the HVACR industry, and have demonstrated success in selling preventative maintenance
- Have established multiple successful customer relationships during your tenure
- Display an understanding of the skills needed to sell an intangible product
- Are striving to become a top-level professional in executive/strategic sales

 *Pre-requisites to attend this program: At least two years of HVACR service sales experience, practical knowledge of estimating, a track record of success in selling PM contracts, and completion of the Sales Leadership Symposium by your sales team leader*

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# TAKE YOUR CAREER AND EXPERTISE TO THE NEXT LEVEL OF PERFORMANCE.

## SALES MASTERS I

Sales Masters I is a four-day program specific to the intermediate-level service sales employee. No longer new to the industry or perhaps even the company, this employee is a valuable member of the team with several years of experience that have refined his or her skills and abilities. But, these employees may be missing the tools and insights needed to really take their expertise to the next level. With a curriculum designed and taught by MSCA industry experts, Sales Masters I will give these sales professionals the boost they need to become the go-to resource for their teams and customers.

### **Sales Masters I topics include:**

- Establishing a prospecting plan to build your portfolio and identify new opportunities
- Enhancing your proposal writing and presentation skills to proactively identify needs before they arise and opportunities for add-on services
- Understanding the art of financial selling to create more consultative partnerships with customer executives on your accounts
- Partnering with your cohort on team projects to practice the skills you learn before you leave the program
- Designing a personal action plan to continue to build on the skills you learn in the Sales Masters I and strengthen areas of weakness, all with the support of your sales leader

# PHASE 3 (CONT.)

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## SALES MASTERS II

In Sales Masters II, the high level of training continues on the campus of the University of Houston Sales Excellence Institute. This week-long program will provide an unparalleled experience in a high-tech academic setting taught by acclaimed sales experts and industry leaders. Participants will be challenged to use inventive thinking to cultivate their talents, all while forging relationships with peers from around the country who are of the same caliber. Within each module, attendees learn through case studies, review of pre-work assignments, post-work change contracts, and experiential/role-play opportunities. Sales Masters II is sure to shift your A-game to an A+.

### **Sales Masters II topics include:**

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- Learning advanced communications skills that help you extract information that leads to the right solution for customers
  - Advanced sales negotiation skills to seamlessly “seal the deal”
  - Going beyond transactional and consultative relationships
  - The customer buying process and advanced need identification
  - Shifting from managing with authority to managing with influence
  - Change contracts and post-training planning so you can continue to build on concepts and tools learned during the course in your workday
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# GAIN EXPERIENCE BY ACCLAIMED SALES EXPERTS AND INDUSTRY LEADERS.

## About the University of Houston Sales Excellence Institute (SEI)

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Housed in the Bauer College of Business at the University of Houston, SEI is recognized by the academic community as the leading sales education program in the country. SEI strives to be the leading global network for sales research with a mission to create sales knowledge, advance sales education and develop outstanding sales leaders through exemplary research, learning programs and partnerships. SEI's faculty includes professors who have 75 years of Fortune 500 sales executive management experience combined to give students cutting-edge, real-world expertise. Conveniently located 15 minutes from Houston's Hobby Airport, an on-campus 4-star Hilton Hotel, executive dining, state-of-the-art classrooms, and world class fitness center will all help ensure a productive and hassle-free campus experience.

FOR MORE INFORMATION, VISIT THE  
**SALES INSTITUTE** ONLINE.

[www.msca.org/salesinstitute](http://www.msca.org/salesinstitute)



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