DEVELOPING A CONCEPTUAL MODEL FOR NEGOTIATION TECHNIQUES IN CANADIAN SERVICE COMPANIES INCLUDING THE HVAC BUSINESS

A thesis submitted in accordance with the requirements of the University of Liverpool for the degree of Doctor of Business Administration

By

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completing my DBA project to my entire family and all of my friends who have influenced my academic life in one way or the other, thanks and may God bless all of you.

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GLOSSARY:

BTU: The British Thermal Unit

Closing Ratio: The number of deals sales agent close comparison to the number of leads provided

CRM: Customer Relationship Management

CU: Customers

DM: District Manager

ESA: Electrical Safety Authority

EM: Employees

FM: Field Manager

Heat Lost: First step in the calculation of Home's heating and cooling system

HVAC: Heating, Ventilation, and Cooling

Hydronic: System that uses water as heat transfer in a mechanical system

JA: Junior Agents

ODP: The Ozone Depletion Potential

OM: Operation Manager

SA: Senior Agents

Sales Agent: Sales representative

Sales Lead: An individual who may eventually be a client

SM: Service Manager

SM: Sales Manager

TSSA: Toronto Standard and Safety Authority

WSIB: Workplace Safety and Insurance Board

ABSTRACT

This study attempts to create a reasonable model of negotiation to improve the sales techniques of Energycare's sales agents. The company serves a massive scope of clients. Therefore, there is the utmost need to develop a theoretical model that essentially addresses the preferences of practically all clients with various needs and demands. It remains significant that the competitive levels in the management process of organizations are incredibly high in the Canadian market. Along these lines, the Energycare specialists and team leaders need to devise powerful frameworks to counter rivalry. In this study, the various phases of action research are applied. The action research is founded on rationalization learning and incorporates a single, double, and triple learning process. This study intends to assemble various participants with alternate characters, responsibilities, and abilities to team up in an open business environment and assess the company's negotiation procedures from an alternate perspective. As indicated in the findings in chapter 5, certain aspects make a negotiation process a success. In addressing this concern, Zott and Amit (2010) stated a few critical ideas utilized in both distributive and integrative ways to deal with negotiations. Within a negotiation process, both parties have various concerns and limitations. Each individual has a booking indicate, alluded to as the primary concern. This represents the point in which an individual cannot leave and instead ends the negotiation. Concerning the findings of this action research, Energycare needs to have a long-term investment in sales agents and support them with precise and pragmatic training.

Energycare should have a systematic and standard sales presentation process and train the sales agents to value customers with all the critical factors explained in different parts of the "perfect visit." The perfect visit is a recommended presentation book described in detail in chapter 6 of this action research. Increasing customer expectations with "value propositioning" is

critical for Energycare sales agents since it helps them skip the “price-trap” when negotiating with them. Considering the competencies of Energycare, some valuable solutions were recommended in this action research. Among the list of recommendations in the findings are some practical programs such as “Rental HVAC equipment” and “Smart Monitoring device,” which can distinguish Energycare from their competitors and support sales agents in their value proposition.

CHAPTER 1: INTRODUCTION

1.1 INTRODUCTION

This chapter begins with looking at the situation where the subject of the research is situated. This included exploring the factors that play a key role in determining positive outcomes in operations. As such, the chapter examines the market competition within the Canadian service market. This is to provide meaningful information when conducting the research. Various theories associated with identifying the background of the problem with the context of the research subject are explored. The ideas play a vital role in developing the research questions that assist in the fieldwork.

This study focuses on developing a wide-ranging conceptual model for promoting effective negotiation. The negotiation is targeted towards enhancing the closing ratio of the sales agents and improving the company’s sales volume. Service firms handle a vast number of consumers from various corners across the globe. In this case, there is the need to develop a significant model that focuses on potential consumers' needs. The primary assumption is that there is increased market competition within the Canadian service market. Due to this, there is the need to develop a practical framework to promote the company's competitive edge and promote increased revenues via sales. The evaluation focuses on the fact that the service sectors have to implement a competitive negotiation approach to affect the consumers’ purchasing behaviours. Therefore, the emphasis of this research is to provide a conceptual negotiation model and the ideal presentation of sales for the firms in Ontario, particularly Energycare. The study will achieve this by implementing various aspects of action research (Checkland and Holwell, 1993). My action research will involve gathering participants from the Energycare Company with multiple talents, social values, and roles. These participants will help to examine the existing sales mechanisms from various perspectives. A critical and dialectical learning process underpins the research process. Furthermore, it will be linked to a single, triple, and double learning process proposed by Checkland and Holwell (1993).

1.2 BACKGROUND OF PROBLEM

Various theories from existing literature argue that sales representatives are likely to directly interact with the consumers to create awareness of the services offered and impact the consumers' purchasing process. Meaningful, profound negotiation and communication skills are vital in persuading the consumers to buy the company's commodities (Zhou et al., 2009). How to convince the consumers and the approach to be utilized by the sales representatives are some of the issues this study focused on answering. The study employs action research in various ways; this systematic approach is used as underpinned by Barton et al. (2009):

1. Emphasize an open framework
2. Profoundly be acknowledged via inductive, abductive, and deductive mechanisms
3. Be underpinned by a double, a single, as well as a triple-loop learning process
4. Be critical and impacted by a dialectical learning process
5. Examine for small mistakes
6. Examine each level in recursive aspects of the research

In this research, my responsibilities as a leader involved handling various tasks and working with the team to implement these approaches towards meeting the study's objective. According to Stacey (2011), the participants within the group and the company may not show how local aspects impact it. By making relevant justifications of the action research and stipulating both the long- and short-term goals, the study is likely to become a success.

1.3 PROBLEM STATEMENT

The study focuses on creating a conceptual negotiation framework for various Canadian service companies, particularly Energycare. Most of these firms have not placed value on the training of their sales representatives. This study emphasizes developing the right business strategies of negotiation and hiring long-term agents to contribute to the organization's success. Even though the sales skill is critical in the negotiation process, several equally essential factors directly impact the success of sales agents. Based on practical knowledge, about 80% of sales agents lack increased performance because they do not have the relevant negotiation approaches (Ribeiro, 2011). The literature makes the theoretical assumption that most sales representatives fail to persuade consumers effectively. This results in developing a critical negotiation model for the firm to achieve a competitive edge within the service industry (Ribeiro, 2011).

1.4 ENERGYCARE CONTEXT

With more than 5,000 employees, Energycare is one of the largest residential and commercial home services companies in North America. This company is one of the most prominent game players in HVAC products, plumbing, electrical services, and home protection and maintenance plans. This research focuses on business to consumer (B2C), which is limited to the residential division of Energycare. The sales and marketing of B2C products are primarily emotional, and sales agents should concentrate on the benefits of products and services being offered and the pain that specific products can solve (Teo, 2004). See Appendix A for the company's services and categories.

Service companies like Energycare should embrace the success strategies that fit in the same framework and hire sales agents familiar with assigned game plans to present the benefits of products in the best way and impress customers in their presentation. Energycare's view in hiring sales agents is very traditional, and most managers accept all types of resumes and experiences to fill their positions. Of course, such an approach is rooted in numerous factors that can be explained in different chapters of this action research. It might be challenging to hire sales agents who are qualified to meet all the company's requirements. Nevertheless, Energycare can implement more efficient strategies in hiring and training more talented individuals. Also, they have to adopt a standard training strategy to equip them with the latest negotiation techniques, thus increasing their growth, as examined in Appendix I.

1.5 ACTION RESEARCH QUESTIONS

To meet the objectives of the study, the answers to the questions below will be provided:

1. Is technical knowledge or sales knowledge alone enough to sell HVAC products? Or, do sales agents need to be equipped with outstanding negotiation techniques?
2. How important is it to train sales agents and qualify them with negotiation strategies?
3. What is the meaning of negotiation? How can different layers of the organization help agents to be successful?
4. How important is it for agents to control moments of negotiation and react accordingly?
5. Why do sales agents need to focus on value creation versus price?
6. How can the company support the sales agents in the sales presentation and negotiation process?
7. How important is it that parties of negotiation trust each other?
8. Is it beneficial for established and large companies to have a long-term investment in agents, and for them to stop hiring seasonal salesmen?

9. How should agents effectively monitor situations and control their cognitive biases (the tendency to make systematic errors that influence their negotiation performance)?
10. What kind of training is required to improve negotiation skills? How does one determine the length and material of training?

1.6 THE SCOPE OF THE STUDY

The research will extend to examine the different strategies required by the business operators to impact the buyer's decisions. The study will include an investigation of the exchange abilities joined in various arrangement models (Cedrola and Battaglia, 2016). This exploration will inspect the effect of the particular exchange methods in the different deals' introductions. It will assume a primary role with sales representatives and administrators. In addition, it will help the business operators, specifically those in the Canadian market, improve their market share. Moreover, it will disclose negotiation difficulties in the HVAC administration industry and give practical proposals to progress (Cedrola and Battaglia, 2016). All the more critically, it will deliver a theoretical model of an arrangement method utilized by deal specialists to fulfill their obligations. The model will combine the significant abilities required by the business specialists to win the customers' trust.

1.7 CHAPTER CONCLUSION

This chapter began by introducing the competitive service available in the Canadian market. Through the market analysis, it was experienced that the market entails a wide-ranging conceptual model, which helps in negotiation techniques that play a crucial role in determining the competitiveness of service firms. Moreover, the chapter explores that the negotiation technique is targeted towards enhancing the closing ratio of the sales agents and improving the sales of companies in the service market. This is because firms operating in the service market attend to many consumers, thus needing a significant model that focuses on potential customers' needs. A practical model can promote the organization's competitive edge as well as boost increased revenues via sales. This chapter focuses on providing a conceptual negotiation model and the ideal presentation of sales for Energycare within the fact that it dominates in the Canadian service market. Sales representatives in competitive firms in the service market can influence consumers' purchasing choices since they interact to create awareness of the service offered. Therefore, they need competitive negotiation as well as communication skills to persuade consumers. This chapter explores examining the skills possessed by a sales representative in Energycare. Furthermore, the recruiting of sales agents in the firm is reviewed to help identify the firm's weakness to develop research questions. Energycare's view in hiring sales agents is very traditional, and most managers accept all types of resumes and experiences to fill their positions. Of course, such an approach is rooted in numerous factors explained in different chapters of this action research. Also, they have to adopt a standard training strategy to equip them with the latest negotiation techniques, thus increasing their growth.

CHAPTER 2: LITERATURE REVIEW

2.1. INTRODUCTION

This section provides a review of the relevant theories linked to the subject of the study. To begin, background information relating to negotiation is provided. It includes the definition of negotiation. In addition, the literature review focuses on relevant negotiation strategies. The process of building relationships is also discussed, and the framework for promoting a win-win situation. The contracting theory is provided alongside the mechanisms of handling multiple negotiations. Additionally, the aspects of negotiation training and action research are also examined.

The research questions that have guided past studies on negotiation have tried to answer queries such as, "What drives people and entities to negotiate?" Additionally, they have focused on people's behaviour during the process, how they twist the outcome to their favour, and how disputes can be solved to gain mutual agreement and the best outcome for all the involved parties (Borbely et al., 2017). Throughout the studies, the lack of actual vocabulary to apply in the process and the ordinary propositions that are vital across the board has been a challenge. Negotiations in the future must include three concepts to bring all the interested parties together. The failure to know the exact words to use, limits of the proposition and underlying requirements have led to the failure of many negotiations. Setting standards can be of great benefit to future negotiators. Smith (2018) argues that bargaining is a concept that seeks to explain individuals and products' combined process aiming to do something. Such a combination creates something new and different and describes what happened in this process. Smith (2018) also explains that negotiation accommodates the influences that people and resources have contributed and visualizes it as three dimensions of Form, Frame, and Flow that explain the socio-personal practice of learning. Organizations dealing with the HVAC services in Canada then have the challenging task of ensuring that customers value the money they pay for the services.

According to the previous study conducted by Jang et al. (2018), negotiation can be “a complex, multifaceted process among multiple parties and constituencies” (Jang et al., 2018, p.319). From this definitional perspective, it starts when potential partners begin discussing issues. Therefore, it acknowledged that the negotiation process bridges initial attempts to solve a customer problem to sign a legally binding contract. Besides, negotiation is a communication style, where within it, four techniques: passive, aggressive, passive-aggressive, and self-confident, can be retrieved (Bajalski and Sevic, 2020). Within this context, the question becomes, what is the negotiation and how is it affected by the sales process?

Trust and power are typical elements that influence negotiation. According to Kong et al. ‘s viewpoint, trust is “elemental in mixed-motive negotiations and repeated bargaining” (Kong et al., 2017, p.15). They also explain that a negotiator can choose to continue or discontinue a negotiation when facing a crisis at the negotiation table. Thus, it is an essential factor in shaping this decision. On the other hand, power is also an integral facet of negotiation. Without an aspect of it, either party would concede to the other, or no decision is made concerning the aim of bargaining. From Galinsky et al. ‘s (2017) perspective, power is the probability that a negotiator will influence a negotiation outcome in the direction of their ideal outcome. This view illustrates that it is crucial to acknowledge that power is a relative concept. Furthermore, it greatly depends on what parties bring to the table, which may entail alternatives, information, status, and social capital. Therefore, negotiators who have multiple rather than single alternatives feel more powerful. In addition, “knowing the other party's sources of power (their alternatives) is key to successful negotiation” (Galinsky et al., 2017, p.610).

Status and social capital are also aspects of power. Within Galinsky et al.'s (2017) definition, context status is the extent to which a negotiator is respected by the other party involved. In contrast, social capital is acquired through having a large or strong social network. Power can significantly affect what a party brings to the negotiation table since it increases the probability that individuals will achieve their ideal outcomes because power has transformative effects on individuals' psychological states. Also, "when people feel powerful at the bargaining table, they are more likely to decide to negotiate and ask for more rather than simply accepting an offer as it is" (Galinsky et al., 2017, p.612). From this concept, Galinsky et al. (2017) explore that the overall effect of power when applied to the idea of negotiation is that it translates into better outcomes by leading negotiations to be proactively ambitious to negotiate rather than accept an offer, to make the first offer and to make ambitious offers. This can have a significant impact on negotiation as it applies to selling.

Negotiation is an essential aspect of selling ideas and wares. This is because "negotiations determine whether a selling firm manages to close a deal hence outshines the rivals" (Geiger, 2017, p.91).From another dimension, negotiation allows both buyers and sellers to voice how value is assigned based on their approach to sales interactions (Geiger, 2017). Additionally, successful selling is contingent on the salesperson's ability to adjust their sales delivery based on their needs or concerns. This suggests that a salesperson's negotiation strategy directly indicates how successful they will be at producing sales consistently. Holmes et al. (2017) also support the claim that price outcomes and customer satisfaction depend on the different interactions of customers' persuasion knowledge and salesperson negotiation strategies. Their research explores that when salespeople use negotiation strategies to work with customers, they concede less, and the customer gets more satisfied. Various viewpoints from scholars contribute to the aspect that “personal power in negotiation has a significant degree while discipline, readiness, and internal concentration give the negotiator possibility of success” (Bajalski and Sevic, 2020, p.107). Furthermore, it is the kind of negotiations that a salesperson brings to the forefront that significantly impacts what type of sale they will attain. It is from the observation that “hardline bargaining involving few, small, and increasing concessions on a single issue leads to higher personal profit” (Geiger, 2017, p.94). Still, less positive socio-emotional evaluations of the negotiation than soft line bargaining elicit benefit from the partner by offering one's concessions. It contrasts with Holmes's idea, which states that "In essence, the salesperson does not have to give in to all customer demands (e.g., price cuts) to ensure the customer is satisfied. Rather, the salesperson must be perceived as fair in response to customer demands. Thus, a "win-win" outcome can be orchestrated by the salesperson if the deal is perceived as fair by both sides" (Holmes et al., 2017, p.83). This illustrates that mutual value should be the desired end goal of sales exchange. Suppose there is not a mutual value reached. In that case, the relationship between the salesperson and the customer could break down. Even if the salesperson can make the sale in one instance, the customer may not call that agent back to serve them again in the future. Thus, negotiation is about selling and building a genuine, mutually beneficial relationship between the salesperson and the customer.

Sales and negotiation are both broad topics, with a great deal of ink devoted to both. Many details make up a good sale as well as a productive negotiation. However, the existence of a salesperson and the presence of a relationship could be considered the top two salient variables at play. As Chaisrakeo and Speece assert in their article, "most companies rely on salespeople as the main connectors for implementing relationships" (Chaisrakeo and Speece, 2004). Additionally, Chaisrakeo and Speece (2004) explore that salespeople need negotiation skills in interpersonal encounters if firms maintain their relationships with their customers and increase sales and profit growth. Furthermore, according to Schneider, negotiation depends on three relevant skills: assertiveness, listening, and flexibility (Schneider, 2012). All three of those concepts are equally essential to bring to the negotiation table in her purview, to the best of one's abilities. Those three aspects are key to any negotiation, from law to, as in this case, sales. Finally, as Mark Lee phrases it in his 2016 paper, "There has been a growing interest among industry leaders to emphasize sales coaching as an essential tool for their business practices" (Lee, 2016, p.22).Energycare is no different.

The study by Anghelus and Boncu (2011) illustrated that the achievement of sales agents was based on the benefits of the entire team. It is linked to the performance and strategies of various units within Energycare. As such, it is critical to acknowledge the whole team's efforts rather than that of particular individuals. The design of management within the firm and the integration of the disparate units directly impact the sales mechanisms. Implementing the suitable tools within the different units as well as harmonizing the strategies can help in improving the closing ratios of the sales agents, which at the same time will enhance the sales numbers within the firm. Within the action research, three key elements that impact Energycare sales agents' performance have been studied, and the underlying values have been examined. Service companies, particularly HVAC organizations, can embrace some strategies in equipping sales personnel to promote their closing ratios. The studied key elements incorporated in this aspect involve:

1. The sales representatives: This includes the mentality, knowledge, expertise, and behavior observed from the sales agents and has key impacts on their performance.

2. The company: It incorporates the infrastructure, which allows the agents to justify the prices regarding the value positioning.
3. Sales presentation: It includes the updated sales presentation that aligns with crucial company competencies, thus enabling sales representatives to acknowledge all of the steps.

The interrelated factors that contribute to performance regarding negotiations are sales promotion, company support, and sales agent. Each concept plays a crucial role in determining the result when it comes to negotiation. The article "Red Hot Selling" points out the power strategies that win the most challenging sale. From it, three essential phases of sales agent performance are a priority. These include planning, execution, and closing. These phases are applicable on universal grounds and do not make assumptions on who or where we sell our products or services Goldner (2007). The article also presents a systematic sale presentation for new sale agents. Typical techniques and how to implement them for success in winning the customers are illustrated within this context. Therefore, the article is a tool to address some of the issues observed during negotiation. However, the piece is not profound enough to handle all the details that sale agents seek to outshine customers in the HVAC industry. Therefore, the three essential phases are adapted to develop a sales presentation triangle, company support, and sales agent. This is to evaluate the success of our sales agents in the integration of all three points. Figure 1 below presents the key elements that are underpinned by this research.

Figure 1: The Interrelated Factors That Contribute to Performance Sales Agent

Source: Goldner (2007)

2.2. HOW SALES AGENTS CAN BENEFIT FROM THREE KEY ELEMENTS IN NEGOTIATION

Both empirical and theoretical literature underpins this section. The literature review emphasized the various studies carried out in previous years and the frameworks applied to the available findings. The interpretations and reflections offered a significant addition to the literature, linked to the various elements and complexities of a conceptual negotiation model. Within the study, the thoughts of the presented theories helped develop a critical perspective and the facets of the negotiation tools. These insights from the proposed ideas allowed me to refine my inquiries around three concepts of "sales agent competencies" and the "role and responsibilities of the company" in the performance of sales agents and the process of a perfect "sale presentation."

In this action research, I took advantage of problems in the company and that are already red flagged by the management team. Sales managers could not emphasize enough the extra costs that the company endures from such deficiencies and how important it is for stakeholders to improve the closing ratio of sales agents. The managers' cooperation was promising. They helped us to access all of the required information from several sections and encouraged the participants to engage more seriously in our action research. I framed my research around the three key factors:

1. Sales agent competencies
2. Company support
3. The sales presentation

This division helped me have in-depth knowledge of the agents required to win the customer and determine that it is not merely the agent's responsibility to make it happen. Several factors and business divisions directly impact this process, and companies cannot expect agents to perform perfectly if other critical elements are missing in the company. The integration of skilled agents, a supportive company, and a systematic sales presentation is essential in the success of Energycare sales agents; thus, this study was framed to emphasize the negotiation techniques, tools, and devices that help agents in value propositioning. The cycles of my action research are shown in Figure 2.

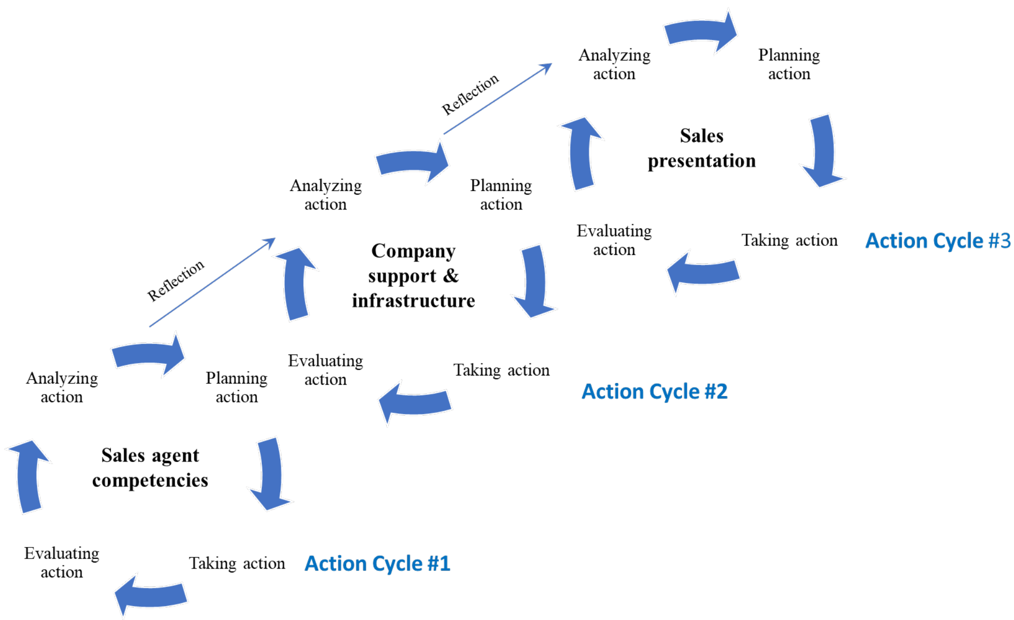

Figure 2: The action Research Cycles of My Research Considering the Factors of the Sales Agent, Company and Sales Presentation

Source: Framed by author

2.3. NEGOTIATION CONCEPTS

Lewicki et al. (2011) noted that negotiation represents an effective conflict resolution mechanism in which agreements are reached while preventing disputes. In a conflict, individuals aim at obtaining the best possible results for their perceptions and ideologies. Brett and Thompson (2016) noted that negotiation is an essential aspect of every person's daily routine. From shopping habits to one's choices in life, negotiation must take a role. To make a significant decision, they must have an internal battle regarding the options and alternatives. A conversation with one's conscience determines the choice based on the scale of preference. Negotiation is a topic of great relevance, and studies have been conducted to boost strategies and techniques for applying the concepts. Studies on negotiation started in the early twentieth century and are still ongoing. The research studies have primarily majored in disciplines (Borbely et al., 2017). Negotiations have also been a tool in controlling conflicts in organizations and bridging divisions among warring nations. In organizations, negotiation concepts have been utilized in group dynamics whereby people have learned to present innovative views to bargain for salary increases (Brett and Thompson, 2016). The implementation of tactics in various negotiation phases (Liu and Sharma, 2011) is illustrated in Table 1 below.

Table **1: Applying Tactics in the Negotiation Phases**

Phase 1 The search for an arena and agenda formulation	**Phase 2** The stating of demands and offers	**Phase 3** A narrowing of differences	**Phase 4** Final bargaining
• Find a neutral venue to conduct the negotiations • Note down the items that the other channel member is interested in relations to one's own items • Assess the demands and requests of channel members	• Exchange one's demands and offers with other channel members • Respond with moderate offers and moderate demands • Outline reasons for the commitment to channel outcomes; probe item outcomes; probe the channel member's reasons	• Seek equitable exchange of concessions with the channel • Delete, add, or yield items if mutual interests converge • Honestly assess channel concessions	• Seek equitable exchange of concessions through the channel • ·Seek mutually beneficial outcomes when conceding or accepting concessions on items

Source: Liu and Sharma, (2011)

2.4. SALESPERSON STRATEGIES AND COMPETENCIES

2.4.1 Competition vs. Cooperation

In competitive negotiation, the negotiating parties are more interested in power, control, and competition, whereas cooperative negotiation focuses on trust, relationships, and flexibility (Anghelus and Boncu, 2011). The two strategies are adopted based on the aim of the talks and whether there are future relationships required following the process. In the service industry, the type of negotiation adopted should be a cooperative one. Whether an organization is taking part in business-to-business selling operations or business-to-customer operations, the ultimate goal should always be to build a working relationship. Both styles of negotiation can take place in one instance. For example, when a sales agent is dealing with a loyal customer and is planning to buy a new heating system, he or she should respect the customer and have enough flexibility in price and conditions to make sure to create a win-win situation for both the customer and the company. Cooperative negotiation begins a long-term relationship with customers (Anghelus and Boncu, 2011) and increases referral customers. The competitive negotiation applies the use of the distributive strategy. There must be service agreement expressiveness and information impartiality (Resinas et al., 2010).

2.4.2 Distributive Strategy

This concept is used in competitive negotiation by firms to determine the one with power and control. The idea involves the scramble for a fixed resource of which all the involved parties want a more significant share (Anghelus and Boncu, 2011). The distributive concept demands that one be a quick thinker, adaptable to complex situations, and a reasonable observer (Tudoran, 2014). In a negotiation process, the seller wants to increase profits as much as possible by pricing highly. On the other hand, the buyer wants to maximize their savings by buying from the seller at the lowest price possible (Jeong, 2016). It indicates a competitive negotiation whereby none may be willing to relent on their maximum return and settle for a minimum benefit from the process. The setting from such types of negotiation indicates that the two negotiating parties (buyer and seller) are enemies of the other. However, the two are interdependent, and one can only gain if the other person concedes to the stated terms. The selfish attitude developed in the competitive-based negotiation sets a condition of a win-lose situation whereby each party strives to close a deal in favor of the maximum benefit accrual on his or her side. The competitive negotiation accommodates distributive bargaining and is not supporting building relationships between the negotiating individuals of organizations (Anghelus and Boncu, 2011).

For managers, the success of an organization must be built upon relationships with clients. Partners use the contending strategy because they may not be directly involved in the running of the business. For partners' indirect management, there are chances that they may be willing to compromise and start relationships that can yield returns. Both parties in an organization need to know the negotiation strategies adopted to improve the performance of the respective organizations. In Canadian service companies, it is essential for internal members of the organization involved in the business's active running to know the relevance of communication. Effective communication in the organization helps inform all the relevant negotiators of the company's policies and thus be aware of the specific objects to be included in the bargaining process. HVAC services in Canada require great customer-seller relationships since even after the installations, the customers need maintenance services (Rezaie and Rosen, 2012).

2.4.3 Integrative Negotiation

This is the type of negotiation whereby one or all parties have the interest of the other at heart. In this approach, involved people consider the win-win situation and cannot settle for less until all the players have left impressed with the outcome (Anghelus and Boncu, 2011). It is the opposite of distributive negotiation, where the involved parties are selfish and only want a win, with nothing in the offer that is short of their acceptable limits. As much as the negotiation aims to achieve double success for both parties, each member usually strives to maximize the value of the outcome (Anghelus and Boncu, 2011). There are several differences between a distributive negotiation and an integrative one. While there is only one issue to be addressed (Anghelus and Boncu, 2011), several factors make each party have interests only in specific components. The other party has interested a divergent interest with some shared interests existing. Therefore, each player has to relent on lower value issues to them and concede to the other party's interests. The same resembles the second disputant. The negotiation should be within relationships and trust (Tudoran, 2014). The respective members of the negotiation should embrace fairness and justice in their decisions and submissions. For example, it is unethical for the seller to quote double the price for service while expecting the buyer to remain loyal to the offer.

The bargaining process for HVAC services in Canada must consider the impact of the heating and cooling equipment on the environment and the manufacturers' emerging technologies to limit air pollution (Rave and Goetzke, 2013). The contemporary issues that the HVAC service providers in Canada should offer new technologies that can reduce air and indoor pollutions (Lillie, 2012). The relevant customers must find value in the HVAC services through clean internal cooling and reduced impact on people with conditions such as asthma (Allen et al., 2012). When the service quality is high, the perceived bargain price increases. This research study will assess the level of improvements that the HVAC companies have in place and how they impact customer value. Table 2 illustrates the comparison between bargaining techniques. In Table 2, I compared the different negotiation techniques from three different factors of motivation, interest, and focus of the relationship and the result clearly shows which approach can help in establishing win-win negotiation and long-term relationships with customers.

Table 2: Comparing Bargaining Techniques

Bargaining characteristics	Competition	Cooperation	Distributive bargaining	Integrative bargaining
Primary motivation	I win, you lose mentality	I win, you win mentality	I win, you lose mentality	I win, you win mentality
Primary interest	Opposed to each other	Compatible with each other	Opposed to each other	Compatible with each other
Focus of relationship	Short-term view	Long-term view	Short-term view	Long-term view

Source: Framed by author

2.5. BUILDING RELATIONSHIPS

Assertiveness and cooperation are important components of negotiation that all concerned parties should embrace. Failure to resolve disputes may result in the dissolution of the friendship. Most parties tend to solve emerging issues rather than address the underlying conflicts. Therefore, it is important to recognize the factors such as past and underlying relationships, the expected need to create unity in the relationship, varying cultures, and the expected results from any negotiation (Liu and Sharma, 2011). Moreover, a higher quality of service is linked to the loyalty of the customers. Therefore, this segment seeks to provide different models that help overcome the customer regarding negotiation.

The dual concern model posits that members should consider their expected outcomes and interests and others' expected outcomes and interests (Blake and Mouton, 1970). These interests must then be ranked and mapped according to the levels of importance to the concerned parties. Adopting a collaborative problem-solving mechanism is highly significant in realizing a productive relationship and substantive outcomes (Liu and Sharma, 2011). The concerned members are interested in building relationships and ensuring that their fellow members in the negotiation also have their interests sorted out. For service companies in Canada that have gained international standards, the teams must understand existing diversities and learn to accommodate them. Cultural diversity, in this case, is given a high priority. In a service industry with its suppliers and distributors widely distributed globally, it is critical to understand their communication techniques. Relationships can be strengthened amid cultural differences betwixt business associates. Although collaborative problem solving is one of the best methods to identify mutual outcomes, it poses a challenge when one member is unwilling to adopt it.

The yielding or subordinating strategy is also an essential concept in negotiation. In most cases, the yielding members have the lowest power to affect the outcome and opt to improve the relationship (Liu and Sharma, 2011). In some cases, the more influential individuals may also yield to the negotiation results with expected benefits such as boosting the relationship with the junior negotiators and reducing any form of hostility between them (Liu and Sharma, 2011).

A win-win situation is a concept that can be applied when negotiating in the service industry. In this context, one of the negotiation teams can decide to listen on the assumption that they anticipate a mutual benefit. One of the crucial components that elicit such behaviour is the trust a member has in the dyad (Liu and Sharma, 2011). Trust can be built before the negotiation time and requires a successful integration into the entire process. Once trust has been imparted, the concerned parties have a positive mentality as they agree to negotiate. Understanding the stakes involved and the need to appreciate every member's concern on the table indicates a positive first step in the entire process.

The relational contractual theory recognizes that "most enterprise activities are accompanied by specific codes of conduct and informal agreements" (Johnson and Sohi, 2016, p.188).The relational contracting approach also acknowledges that apart from the formal contracts signed by the different business partners before a deal, there are more fulfilling ways to explore relationships. In the relational approach to conducting business dealings, "the partners recognize a need for solidarity, flexibility, and control in power to govern relationships" (Johnson and Sohi, 2016, p.188).

2.6 COMPANY SUPPORT

According to Goetzleret al. (2016), the sales representative requires increased company support for various reasons in every aspect of their activities and performances. However, it remains significant for the organization to promote increased guidance and training for the sales representatives to improve their performance and promote the manufacturing of every piece of equipment and products with various features and increase their efficiency of promoting their access to consumers. Energycare has to have all the following support available to enhance the employees' psychological perception of the negotiation procedures.

2.6.1 Value Propositioning

According to Newman (2021), the value proposition predicts the values specified by a corporation that contains the summaries of the company's produce delivery, product experience, and service acquired. More importantly, it sets the idea behind its attractiveness, why it is the best choice for customers, and why the product or service values are unique from matching contributions. As stated by the scholar, the growth of a value proposition is essential concerning the business strategy of a company. This is because it provides a company with the ability to impact the customer's decision-making when regularly displayed on a company's marketing materials (website) (Newman, 2021). In addition, it is an effective instrument to drive sales and build a consumer base. Therefore, it can enhance the effectiveness of the marketing technique of a company. To develop a perfectly tailored value proposition, a company needs to identify its product or service benefits. A piece of more detailed information on the valuable benefits of the product or service makes it easier for a customer to make a quick decision. It is also essential for a company to identify its customers' issues, which the value proposition will address.

In the context of value proposition, three things can be identified. Within it, Laja (2021) suggests that relevancy is essential since it assists in addressing customers' issues and improving their situations. Quantified value as an aspect of the value proposition statement helps in delivering specific benefits to the company. Differentiation helps the company be unique so that the ideal customer has a good reason to prefer the company's product over other competitors within the same industry.

Fulfilling the three aspects of the value proposition enhances the customer lifetime value. According to (Laja, 2021) the value proposition should be accurate and easily understandable by customers since it is designed for people to understand. Therefore, the language to be used should be for the customers. This is to connect with the conversation that already exists in the customer's thoughts. To dominate in connecting with customers' reviews, a company should identify the language to use to describe its offering and how they benefit from it. Therefore, a good value proposition should be clear and communicate the concrete result. In addition, the value proposition should explore the differences concerning the product and services offered by a company compared to its competitors.

D'Andrea (2005) argues that the sales agent who is a high performer can achieve more. He introduces some fundamental strategies that lead to a higher-value perception by customers.

The scholar argues that many sales organizations have shifted from sales volume to sales profitability (D'Andrea, 2005). He believes that it is not enough to hit the sales target; instead, organizations need to lower their operational costs and increase the profit margin (D'Andrea, 2005). Sales agents create value by negotiating with the consumers to meet the company's return on investment (ROI) (D'Andrea, 2005).

In this benefit-conscious business environment, D'Andrea (2005) claims that business executives know well that lower profitability can damage their organization; however, it is hard to change such strategies and remains a significant operational challenge. Most of the sales agents frequently heard that "your products are just a commodity and it is the same as competition" to help "just lower your price" (Citation?) Ron D'Andrea (2005) claims that if high-performing sales agents work more challenging to negotiate with customers to increase the perceived value by the customer, it is justified to pay higher prices. In his article D'Andrea (2005) refers to the exciting results of a yearlong research project by BGI about its global clients and concludes that high performers are more successful in three different key areas:

1. They have "higher goals and achieve more": the negotiators who ask for more achieve more
2. They "add more value and make the deal more profitable by spending more time with customers": D'Andrea (2005) claims that agents who take their time to close a deal have on average 22 percent better settlements compared to agents who spend less time with customers and close their deals
3. When an agent adds value first and then offers the price "High value, high price" (D'Andrea, 2005), they can have better control of the negotiation and build a more profitable solution

D’Andrea (2005) claims that the study proved that agents who offer a high value for their products and then communicate the higher settled price and do not wait for a customer to share the pricing first have an 11 percent higher settlement than others’ deals. D’Andrea (2005) introduces four fundamental negotiation strategies that help agents to be more successful:

1. Give them feedback to learn about their mistakes and their strengths
2. Give them a chance to practice sales and negotiation techniques in a safe environment
3. Allow them to apply the method in new accounts
4. Enclose a robust sales negotiation methodology into organization sales management

2.6.2 Negotiation Training

There is a standard argument concerning the training of employees in effective negotiation processes. The need for training is to learn the techniques of avoiding irrationalities and biases and act in a manner that bolsters positive negotiation outcomes (Elshenawy, 2010). Researchers on negotiation focus on training as impactful to the trainee's life and that the organizations should create an environment that supports the program. Following the adoption of training programs in the organizations, the policy implementers are perceived to ascertain the time allocated for the sessions to be long enough to allow for maximum content absorption. The trainees should also ensure that they build on their competencies by engaging in consistent training modules with enough time to maintain or gain their negotiation skills (Elshenawy, 2010). Gaining soft skills in other areas of management is crucial in the negotiator's career. Abu-Nimer (1998) struggled to highlight the critical elements of training, including having a positive impact on the trainee's life, from their personality to their knowledge of negotiation. In this case, the training goals focus on changing the attitudes and skills and the base knowledge of the trainee (Abu-Nimer, 1998).

Being a method by which parties settle differences, Finkel (2018) argues that negotiation comprises the personal aim of achieving the best possible outcome for their position. Besides, he states that for a successful negotiation, the principles of fairness seeking mutual benefit between parties involved are key. Various scholars support this within the context of their varied views on the subject. For instance, according to Bazerman (2020), different negotiation forms are applied in international affairs, industrial disputes, or domestic relationships. However, the scholar states that negotiation techniques can be used in a wide range of activities. According to Finkel (2018), negotiation consists of at least six phases. Therefore, to attain an impressive outcome, it is vital to have a structured approach to negotiation. This is supported by Bazerman (2020) by outlining the various stages of negotiation, beginning from preparation to implementation of a course of action. In his study at the preparation stage of negotiation, it is essential to consider important aspects like the possible outcome and the bottom line of the talks. However, according to Finkel (2018), the answers to such assumptions might not be of significance, but it is essential to employ them since they might help in smoothening the negotiation.

Other scholars have claimed that the training has to support the knowledge and intellectual capacity that the trainee already has (Movius, 2008). Accordingly, their arguments portray that exercise should remove the growth-inhibiting attitudes and perceptions that the trainee possesses (Abu-Nimer, 1998). It shows that effective training programs have to focus on improving people's knowledge and their skills and attitudes (Movius, 2008). When conflicts erupt within the negotiation process, it is critical to highlight the relevance of all three components in the life of every negotiator. Members who have old attitudes with negative impacts on the negotiation outcome should be educated on changing and adopting social perceptions.

Tudoran (2014) coincides with other researchers in his ideology that the service industry in Canada requires negotiators to be knowledgeable, skilled, and have positive attitudes concerning the negotiating parties. A company that negotiates with a customer needs to know the customer's purchase history, the strategies it would need to convince the customer to acquire their services, and the buyer's personality. Learning about the buyer's purchase history gives the service provider a rough estimate of what price the customer might agree to pay. The personality information ensures that the negotiator is acquainted with how the customer wants to be addressed or values compliments during the negotiation process.

The negotiation skills are of relevance in determining when to close the sale or how to respond to objections created by the customer. The negotiation can take a wrong shift if the customer feels that they should be addressed in a specific manner, and the company's negotiator has failed to value this need. Some people prefer to be called by their surname, while others prefer to be addressed by their first name. Learning these details before negotiations commence requires a great deal of preparation and, if possible, a sales call to the residence or premises of the buyer.

2.6.3 Financial Support

According to Liu and Sharma (2011), the enhanced performance of the sales representative can be influenced by the prices they have at their disposal to provide to their potential clients. These include the entire financing bundle as well as any deferral pricing that they have to offer. Accordingly, incorporating various mechanisms of direct payment such as cheques and credit cards may enhance the potential of the consumer to make necessary purchases and help the sales rep improve on their sales.

Furthermore, Liu and Sharma (2011) have argued that consumers' purchasing behaviours may fluctuate depending on the various seasons. Multiple factors may influence this. However, there are seasons in which consumer purchasing trends are slow. In these cases, it is crucial for the sales representatives to obtain increased financial support. For example, Energycare can support a sales rep by making incentives and promotions available to the consumers. In addition, the sales representatives have to be allowed to develop special packages for potential and loyal consumers and those who have rental water heaters in their homes.

2.6.4 Administrative Support

Sales representatives have to ensure that they build on their competencies by constantly communicating with the administration (Elshenawy, 2010). Gaining soft skills in other areas of support is crucial in the negotiator's career. Administrative support promotes the knowledge and intellectual capacity that the sales representatives have. As such, administrative support has to enhance key practices and operations that enable the services of the sales representatives.

Furthermore, the company has to provide significant installation planning processes. These mechanisms allow the sales representatives to book vital installations for the consumers over the phone at any time that they deem best. Customer service has to be made available to the clients if they have any inquiries concerning the services provided, equipment installed, products purchased, or their accounts. Tudoran (2014) believes that critical consumer service should also trace the purchase history of the customer. Knowing about the customer's service history gives the sales agent a rough estimate of the customer's reaction in offering new equipment to him. When senior members of a company are trained to be competent negotiators, they have higher chances of winning deals with undeniable benefits to their company (Elshenawy, 2010). When that happens, the individuals gain increased self-esteem and satisfaction transferred to the junior employees through relationships, mentoring, and coaching.

2.7 PERFECT PRESENTATION PROCESS

The sales representatives have to commit to a well-practiced presentation process, which ensures that they cover all the information and the product details, thus promoting value. One of the most important components of promoting sales via an effective presentation is that the needs of the consumers have to be met. There is a need for every service provider to assess the underlying benefits for the customer before the presentation can proceed. When a presentation is for a higher price than the one that the customer anticipates, the value proposition can act as security in attaining the seller's interest. Nevertheless, the buyer may decide to accept the deal, given that the underlying gains are presented through the quality of the service expected from the company. During the presentation process, the sales representatives have to be clear of the goal they want and consider the factors that may be sacrificed to achieve a win-win outcome (Olekalns and Smith, 2003). It is only through a win-win outcome that all the negotiators can be pleased. However, a win-lose consequence should not be advocated for by Energycare. By knowing the goals, the sales representatives can make comparisons with the purposes of the other party. If there were no conflicting interests, it would be easier to achieve a win-win outcome.

In an excellent article called "sales presentation Skills and salesperson job performance," Johlke (2006) argues that a sales agent's high-quality training can influence sales presentation skills (Johlke, 2006). Even though some researchers believe there is a direct relationship between exercise and sales agents' performances (Farrell and Hakstian, 2001; Kwon, 2019). However, Johlke (2006) argues that such a relationship is minor. The relationship between sales performance and training is indirect via some other factors such as presentation skills (Johlke, 2006). Energycare can enhance the sales presentation performance of sales agents, which can directly improve their closing ratios. To study the connection between job performance and sales presentation skills, Johlke (2006) argues that several factors contribute to sales agent performance; however, the most important one is training that develops suitable closing techniques. He also emphasized the flexibility that sales agents should have in handling different types of customers. Some skills like listening actively, handling objections, and negotiation, besides the sales agent's customer trust, are critical factors in building relationships with customers. Selling HVAC products is a direct result of the experience of the sales agent; therefore, it is highly recommended that Energycare retain the experienced agents and, in the meantime, improve their negotiation skills and closing ratios by high-quality training.

In presenting critical services, sales agents must be aware of the availability of the process objects before they show their offers. The terms of the presentation should indicate their level of commitment towards achieving the goal and their competence (Kwon, 2019). The consumer and the service providers should regularly interact with the customer to determine the company's capabilities. These interactions are also a critical tool that allows the customer to adjust their requirements to suit their ability. The presentation process should involve:

1. Touching on the key points.
2. Reviewing the steps for selecting and purchasing.
3. Installing the HVAC equipment.

Energycare must be willing to offer some aspects of the presentation which are unique from the ones provided by rival companies. In providing unique selling propositions, the firm indicates that its services may be similar in certain aspects but are not comparable to its opponents' offerings (Kwon, 2019). Explaining such services' uniqueness can affect the outcome, especially when the service buyer has decided to consider the options presented by other service providers. The sales representatives have to understand the exact results they expect from the negotiation. Therefore, the service company's requirements must be specified at the end of the talks, and the customer must agree with the descriptions of the service. Avoiding contractual breaches may call for intensive reviews of the negotiation agreements to ascertain that the components are the ones with which both parties are content.

During the presentation, the objects must be clearly explained. Service-specific, like features of the company, service level, quality of service, or key technical specifications must be conveyed (Ludwig et al., 2005). Secondly, transaction attributes like the price, timing, and potential penalties must also be stated (Ludwig et al., 2005). Furthermore, factors such as price should indicate to be either negotiable or non-negotiable. Decision-making models are important in the services industry as they outline the policies and procedures for engaging in a negotiation (Ludwig et al., 2005). The model can be used to change the negative behaviours of the participants, hence conforming to the requirements of an effective process. The framework contained in the service agreement removes any potential for contractual breaches and supports the relationship-based negotiation. All customers are looking for companies that consider their interests. Energycare needs to consider the strategies mentioned to bolster the outcome of the sales agents' presentation. Upon increased reflection and brainstorming, Energycare is perceived to lack profound sales mechanisms towards training the sales representatives. Therefore, the company has limited potential to provide a compelling presentation package to the sales agents to improve their sales. However, this is key to meeting and negotiating with the consumers.

Based on these findings, the presentation book is key to guiding the Energycare sales representatives. This is attributed to the fact that the book incorporates primary aspects linked to the installation and the critical elements that can add value to the consumers. By using the presentation book, the sales representatives can learn the vital aspects of presenting and implementing these significant steps. While some of the sales representatives may have their ways of negotiating with consumers to obtain increased sales, the fundamentals of the presentation book involve assisting the sales representatives in touching on the core elements of sales in line with Energycare's objectives and goals.

2.8 CHAPTER CONCLUSION

From the above literature review, it is apparent that a lot is written about the content on strategies required by the business operator to influence customer's decisions. This is through an extensive analysis of previous scholars on the aspect of negotiation. Within this context, the definition of negotiation explores copious strategies and the process of building customer relationships. Therefore, the contracting theory is provided alongside the mechanisms of handling multiple negotiations. In addition, the aspect of negotiation training and action research has been considered an area that needs extensive focus. There is an even boastful body of scholarly literature on general business behaviour and the altered traits that affect customer choice. The influence of negotiation on customers' choice of purchase is also a problem with conventional substantial academic attention in the literature. However, the available literature does not focus on specific organizations. As such, the present study, by focusing more on the exchange abilities joined in various arrangement models.

CHAPTER 3: METHODOLOGY

3.1 INTRODUCTION

This chapter sets out the methodological processes of the research. It develops and compares the quantitative and qualitative methods while also selecting the qualitative methodology based on the research paradigm. The data collection along with the sampling strategy and the instrument design are analyzed. Finally, the chapter concludes with the ethical considerations, validity, and reliability of the data and the study's limitations. It entails a systematic dissection of the techniques that researchers apply in a particular field of study. It encompasses the analysis of the theories, principles, and concepts that pertain to study methods. The function of a methodology is to formulate and articulate the best style that the researcher should employ during data collection and analysis to develop relevant results significant for the generation of policies. In this research, I will employ some systematic techniques that I will use to collect the required data for this research. The methods herein will expectedly enable the research aims and questions to be answered to all satisfaction.

According to Beins (2017), a research paradigm involves examining studying phenomena in line with set principles and available information. As a research paradigm, pragmatism is underpinned by researchers' methodological and philosophical mechanisms, which apply to the specific research problem. The objective of this study is centred on negotiations, including the factors and process of the talks. The research paradigm focuses on obtaining solutions to the research questions. The pragmatic paradigm was used in this study to focus on the research question from a different perspective.

3.1.1 Research Methodology

The research method employed included both observation and interviews (Appendix F). Additionally, it incorporated various paradigms, including action research (Krauss, 2005). The process sought to engage participants in the negotiation process by examining the factors impacting negotiation and how to handle the negotiation process. The study was conducted via a collaborative mechanism and with full engagement and participation of team members. Accordingly, it focused on obtaining solutions to an issue and initiating a distinct change reflected by the research goals.

Scholars utilize ontology and epistemology of pragmatism to illustrate issues of methodology. Since the pragmatism theory applies to the current research, I prefer the stereological emphasis of the already existing mechanisms that use pragmatism to identify how pragmatism of social approach significantly applies to this research. Ontology and epistemology pragmatism link to this study via dissolving the dualism of structure and agent, idealism and realism, and the strategic actions. Critical implications exist on the philosophical preference in line with Saunders' research onion as shown in Figure 3.

Based on Figure 3 below, the Saunders onion's significance lies in its adaptability and implementation of the various study contexts. Each of its layers illustrates a detailed level of the process carried out and how the inquiries are addressed. From the aspect that various positions are of fundamental significance for the study, the philosophical part of the investigation was vital within the accompanying sections. The epistemological dimension characterizes the particular place and the scope of conceivable connections among information and the world, alongside what we can know. Regarding technique, the ontological dimension should be operationalized into a methodology of how information can be gained (Fish et al., 2016). Philosophical inquiries were established as critical and incorporated in the research. The work has made critical comments of Antwi and Hamza (2015). These two portrayed the points of confinement of human learning, looking for it in all respects. In this way, the structural ground to the primary realism position, which focuses on the fundamental idea of information, was identified as the logical method for creating new ideologies.

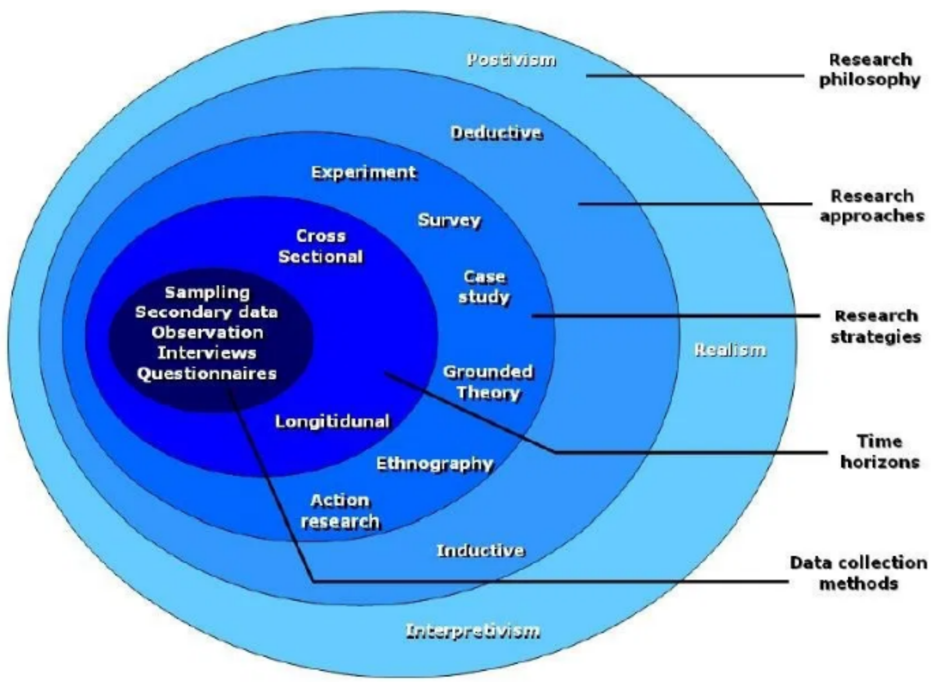

Figure 3: Saunders' Research Onion

Source: Susman (1983)

3.2 RESEARCH METHODS

This section sets out the methodological processes of the research. It develops and compares the quantitative and qualitative methods while also providing the rationale for selecting the qualitative methodology based on ethnographic research. The data collection along with the sampling strategy and the instrument design are analyzed. Finally, the chapter concludes with the ethical considerations, validity, and reliability of the data and the study's limitations.

My research was underpinned by the action research design. Alongside these lines, I utilized qualitative mechanisms in research iteration and on multiple levels. According to Antwi and Hamza (2015), the numerical and qualitative method was established by this fundamental thought and was perceived to reflect the standard methodology of present-day science. Its significant shortcoming is primarily in its reductionism. In other terms, the sociological aspects cannot be canvassed in their full expansiveness and relevance in the quantitative worldview. This shows the improvement of subjective methodologies in research mechanisms, focusing on expanding ideologies past behaviourisms; for example, the selective investigation of apparent conduct. I participated in the action research to identify the issue, evaluate the situation's complexity, and adhere to its proper lifecycle. I reflected on each of the cycles of action to link and make sense of the problem, thus obtaining findings that helped generate critical outcomes. The outcomes of the research were helpful in the application of this DBA research. In this action research, iterative research cycles were adjusted and built within the overall process. The scope of this research encompasses the sales agents, employees, and managers of Energycare in Ontario. It can apply to all service companies that sell or repair household equipment in North America. Value propositioning, the perfect presentation, and the implementation of negotiation techniques are vital concepts of this action research. Moreover, to gain pieces of information from participants and other employees, surveys and interviews were employed. I believe in this process, the trust built between myself and the participants was remarkable and led to sharing and collecting clear and honest opinions.

3.3 MY ACTION RESEARCH PLAN

My research involved the utilization of Lewin’s model to develop the research plan. With references to the study done by Lewin and originating in the scholarship of the practices, it shows that there are minor problems based on the contemporary intellectual theories of the sciences (Coghlan, 2008). Through the research, he discussed that the study constitutes multiply pronged processes that are variables, which require actions and identifications of situations, and analysis of the possible solution, which involved: Constructing, Planning, Action, and Evaluation. The model was employed to identify the critical aspects within my DBA research from the external and internal study cycles and case studies (Louis and Bartunek, 1992). This research was cyclical, and the process was implemented to involve the ideologies of Coghlan and Brannick (2010). The critical steps within the study were those of Lewin (1947). Various strategies are possibly appropriate for this sort of research; deciding for their utilization and the discourse of subjective techniques in obtaining relevant information for analysis included the grounded theory and action research. Based on this study, action research was perceived as critical to receiving relevant data for analysis. My action research represents a mechanism based on practical actions and several cycles created within the process, as shown in Figure 4 below. Serious participation of team members, managers, and senior technicians of the Ontario team allowed me to recommend a few practical solutions that address the problems of this research. Therefore, it is expected that managers will implement them in their short- and long-term strategies. Figure 4 below specifies the overview of the author's action research.

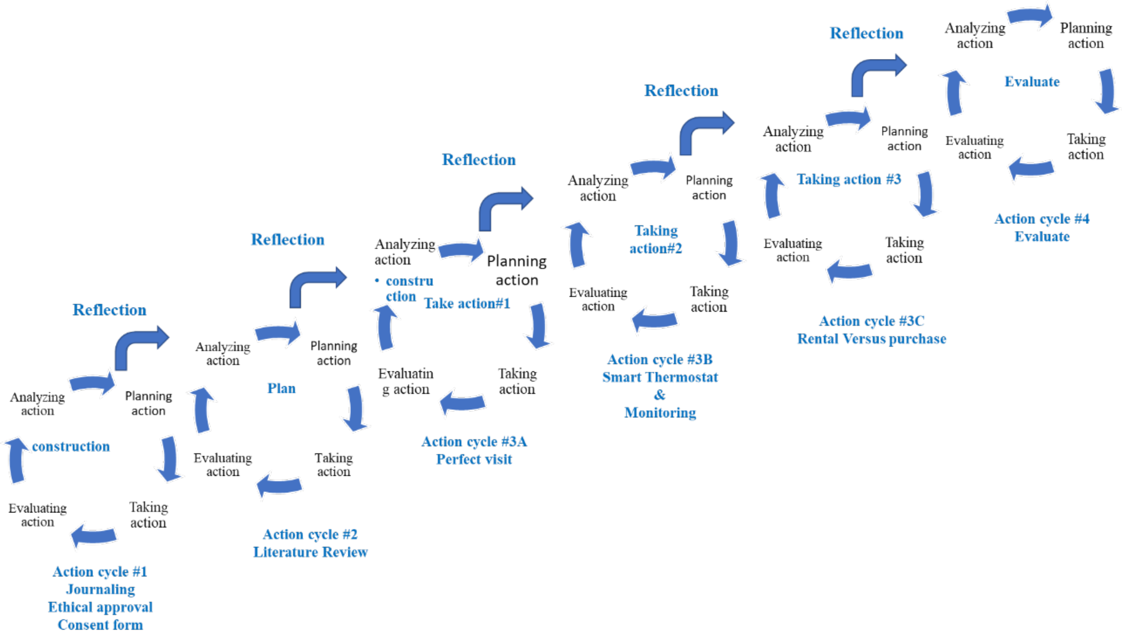

Figure 4: My Action Research Overview: Construct, Plan, Take Action, Evaluate

Source: Framed by author

Data collection and reviewing the data took about 9-10 months, starting from March 2019 to November of the same year. The content of the data collected was checked and evaluated by participants and the team of managers. To understand the chain of issues that contribute to an agent's failure and recommend practical solutions, the team needed to take all parameters seriously and work in detail. Considering the extra costs for introducing any changes in company strategies made the participants and peer researchers discuss the raised issues and not ignore any questions or criticism. A realistic plan and schedule (Appendix M) were crucial to meet all the goals of my action research on time. My knowledge and experience, including all the subjects that I have learned in previous modules of my DBA program, helped me as a practitioner to have extensive engagement in this action research and to encourage team members to participate. Table 3 shows the timeline table of my action research, which clearly defines the timelines and activities of each phase. Table 3 below indicates the action research approach and timeline

Table 3: Action Research Approach and Timeline

Timeline	Main Activities	Objectives	Core Activities
March – April 2019	Action Cycle 1 – Construction	To plan the research process within a maximum of 18 months	• Ethical Approval • Informed Consent • Journaling
May – June 2019	Action Cycle 2 – planning	To obtain key articles and identify the frameworks for gathering key data	• Critical literature review • Reframing my plan
July – August 2019	Action Cycle 3 – taking action	To identify participants, interview, and provide questionnaires.	• Survey methodology and analysis • Focus group • Case study interviews • Data gathering process • Coding and analysis
September – November 2019	Action Cycle 4 – evaluation action	To gather information and test data using research frameworks identified	• Taking action
November 2019	Reviews, action and writing the report	To examine the trends within the data using SPSS and excel research tools	• Evaluation • Conclusion

Source: Framed by author

The action research does not represent a one-size-fits-all methodology since the information obtained is associated with the context (Coghlan & Shani, 2014). At the beginning of the study, we utilized routine meetings with the participants to review the information which emerged. The process enabled appreciation of the aspects, which incorporated the data. The outcomes of the action research were reviewed, including both the unintended and intended outcomes. This resulted in an additional research cycle. Some of the outcomes within the research were disappointing, while others were identified as expected. The story of how I navigated the action research from start to finish is elaborated in this study.

I utilized the action research cycle spirals to construct the narrative. It enabled me to capture the moments within the process. In categorizing the different elements of the cycles, I established the story and implemented the mechanism. The primary text is identified with the story, while the reflections illustrated how it related to the readers. The entire story is elaborated, illustrating my reflection on the whole project and the aspects that I learned.

3.4 ACTION CYCLE ONE: CONSTRUCTION

3.4.1 Constructing the Initiative

It was relatively easy to gain access to the research site since it was within the organization. One of my first prominent roles was to identify the research team participants. To explore, discuss, and challenge approaches, I needed a team to give explanations and findings in an open and objective atmosphere. According to Coghlan and Shani (2014), this laid the initial challenge concerning role duality while researching the inside action. I could not escape the reality that I had a relationship with other stakeholders and colleagues since I was a senior staff member. Besides, there were ethical issues (noted below) based on my position as a member of management entrusted with the responsibility of undertaking collaborative research together with my subordinates. First, I shortlisted members of the staff who possessed qualities such as being self-driven, passionate, and having positivity towards themselves and life in general and towards the organization. They were chosen from different departments within the company, different genders, ranks, and age profiles. To embrace reflexivity, I was very cautious about the descriptive qualities I chose concerning this team. Members' opinions about these individuals resembled mine as they concurred with the assumptions I obtained in my study. By the use of email requests, I was able to approach my targeted participants. I sent every targeted individual an email requesting him or her to volunteer as part of the team, which was expected to research a negotiation process that could objectively change the company to a customer-centric organization. As a team, we worked with people who have positive attitudes towards the research cycle to articulate the problem and construct the research questions.

To address the problems, an action researcher needed to consider that they had a primary role in this process. The main objective of the research project is to address specific issues as they occur (Coghlan and Shani, 2014). The main problem that my research needed to address in the firm was inadequate negotiation frameworks. To amicably address the issue, I needed to understand the following questions:

1. The meaning of the lower closing ratio of sales agents in the organizational context.
2. The causes of poor customer service.
3. The purpose of customer centrism.
4. The action plan was to be adopted to move to the desired state and what was to be learned along the way.

A brainstorming approach was used to address the above questions by the team. To translate our concern to a research topic, we needed to know why it was essential for us to investigate it. In addition, what were we missing when we lost customers? Collaboration with colleagues and in-depth interviews with agents and team members helped us better understand our research topic. Data collection, recording the company's existing situation, and studying the relevant literature happened in this step.

3.4.2 Ethical Approval

In this research, I proposed that action research be a means to an end. I have worked with Energycare for an extensive period. Being one of the employees, it remains my obligation to abide by the principles and policies of the company. The company's code of conduct outlines its ethics, regulations, and goals, as well as values. The code of conduct identifies the rules that guide every employee to carry out their operations effectively. As outlined by Eisenhardt and Sull, (2001), a company's rules may be clear and precise. However, the implementation process determines the potential of the employees to adhere to them. This is attributed to the policies and guidelines that may be interpreted in various ways. Guided by the company's code of conduct and principles, the team decided to work within the stipulated rules that guided working collaboratively on a team-based project.

According to Eisenhardt, (2001), managers alongside leaders must enforce regulations that support the needs and demands of the stakeholders. During the research process, I experienced that the team faced particular challenges, including conflicts that required immediate actions. In this case, the policies set were not significant in establishing the following step. We were in crisis when one of the team members attempted to overrule the shared values and interests. At that point, we needed to stop and do key reviews to ensure that everything was in order and that everyone was committed to a common interest and goals.

I had sound principles that allowed me to remain ethical during the research process. However, during the procedure, there were certain biases or ethical problems. In these situations, I reflected on my behaviour as underpinned by the work of Bell and Brynma (2007). In addition, I had to monitor the events that occurred closely. The primary aspect of this research involved obtaining a more comprehensive picture of the negotiation process within Energycare to promote sales. The results of the study announced increased inclusion and openness as well as external analysis. Moreover, an examination of the study's objectives was done, and the participants were informed of the project's purpose before being handed the consent forms.

3.4.3 Informed Consent

The following process involved the formal action of the research process. It involved implementing the standard research cycles. The consent forms of the research (Appendix D and Appendix L) were given out via hard copies to the members and emailed to the participants. The consent forms allowed us to acknowledge the consent of the participants towards taking part in this research. My role involved informing the respondents within the research with clear information concerning the purpose and contribution to the study. I made sure that the participants acknowledged that they were attended to with the most significant ethical standards. Additionally, my role involved ensuring that the participants upheld impeccable ethical standards. I also made extensive efforts to make critical clarifications and ensure that they were involved in the study with their anonymity intact. Being new in research, I confirmed that my research was verified and examined by my supervisor. I believe that the information I obtained from the study is relevant to business management and growth.

3.4.4 Journaling

I began journaling towards the start of the thesis cycle to make relevant connections by collecting new information and promoting reflexivity, as noted by Coghlan and Brannick (2010). My journaling process continued during the development of the research and at the finish of the study. I employed the model presented by Schein (1999), which involves observing, reacting, judging, intervening, and evaluating how these aspects impacted the research process. The process allowed me to make key observations of my experiences and my interpretations of the events. I was able to make critical reflections on “why?” and make an in-depth analysis of the findings from the study. I realized that I had various ideologies and that the scope expanded beyond my plans. However, the journaling process allowed me to remain on track and follow the right path of the research (Appendix E). I made small notes of the research incorporating my responses to the events. It allowed me to see things from my perspective. During the investigation, I acted as an observer. It forced me to overstep my participants' boundaries via the facilitator form of curious inquiry. Some people felt that my practice was not supportive because it slightly deviated my roles from that of the team. As such, I kept my entries to myself as it could have led to significant conflict within the group. I realized the need to work collaboratively as a team and eliminate bias within the action research.

3.4.5 Sampling Method

The random sampling process was employed in this study to obtain the right participants for collecting relevant information based on the research question. While the participants participated in the initial phase of the research method (in-depth interviews), it was relevant to observe and interview them (as scheduled in Appendix H) to prevent the possibility of inaccurate data. The resulting study did not emphasize generalizing information. Instead, the study emphasized providing key insights in line with the negotiation process (Hancock et al., 2006). The participants in the study were informed of their participation through emails (Appendix B). The email entailed the reason for the study, the scope of the research, and their right to participate. Additionally, the content of the consent paperwork involved the ethical practices that were to be implemented during the study. Furthermore, an induction process was conducted to enable the participants to understand the relevance of the study. Finally, the identified participants were required to finish the questionnaires, which included various questions focusing on the negotiation process. The research plan lasted a month and two weeks.

I used a purposeful sampling strategy in this research, and most of the participants were people such as sales agents and managers who are always on the company's front line. I tried to choose people who had the highest engagement and were motivated to solve the issues. I know that I could extract better results by having a bigger sample size; however, considering the company's limitations, it was not feasible to do that. The number of people who were interviewed was 72 in total; that is explained in detail. The number of samples in my research is almost the same as the research title: "Negotiation in buyer-seller relation" (Harwood &Garry, 2003) that presented a standard strategy of general negotiation. It had a total of 72 interviews, 32 questionnaire data, and 25 hours of negotiation recording, which is very close to the sample size of my research.

3.5 ACTION RESEARCH CYCLE TWO: PLANNING

As Coghlan and Brannick (2010) postulated, a democratic and collaborative approach forms the main characteristic of aaction research. I worked with the participants in planning for the project. As an action researcher, I succeeded in providing the beginning of the initiative, providing a perfect illustration of the desired end state, and enacting a pathway that would lead to a more collaborative state. Nevertheless, the team indulged in promoting service based on how the organization had deteriorated to a low level of customer engagement, calling for an address by the action research. The organization, in its state of confusion, sought to seek answers to questions similar to mine. Thus, during the enacting of the plan-act-evaluate-reflect research cycles, collaborative action planning was continuous. Due to that, every person had to be conscious in developing understanding and applying this concept over time.

Data can be defined as ordinary bits and pieces of information collected from the environment (Merriam, 2014). Data can either be invisible and difficult to measure or concrete and measurable. The perspective of the investigator renders information or data collected valid or invalid. In this case study, the understanding of the contents of data was taken. Minutes of meetings and brainstorming sessions, peoples' behaviours, internal company records, emails, photos, and sample customer "horror stories" were the primary data sources. During the fieldwork period, I used several methods to capture data. To begin with, I mentioned a research diary that immensely helped me evaluate experiences and events as they took place. The research diary was of great importance in my research as it played a central role in serving as a data analysis and reflection tool. I managed to make entries as close to the day and date as possible.

I was also able to explain my feelings and reactions, evaluate what seemed excellent and valuable or inadequate and useless, analyze what to do with the information (keep or discard it), and provide a conclusion and action steps. In some incidences in my research, I made use of a notebook. I could make brief notes, which I could transfer to a diary later in the office or at home. The primary source of data was a research diary. I used observation as my second data gathering method, mainly used when holding meetings with research participants. Along with the above, I could be very conscious of the subject and content of discussion in such arrangements. To provide validation, I could make a conscious observation in other settings.

3.5.1 Reframing My Plan

In this phase, I focused on reviewing the literature and sharing various findings. We examined the most appropriate negotiation model for Energycare for increasing its sales and gaining a competitive edge within the industry. During this time, we also reviewed the action research and developed a research methodology to collect relevant data from the employees within the firm. The research plan illustrated the realities contingent on human practices and can be observed via social perspectives. This step involved employing more of the qualitative method of the research to collect and analyze relevant data. I focused on establishing a rapport with the research participants. As underpinned by the work of Fetterman (1998), I implemented the "big net approach."

3.6 ACTION RESEARCH CYCLE THREE: TAKING ACTION

The primary research process involved the semi-structured interviews that were carried out to offer critical data for the evaluation process (Appendix F). An interview outline was required to advance iteratively as a vital aspect of inquiry (Horrocks et al., 2019). The number and role of participants and the outcome of the interviews are illustrated in the Table (4) below:

Table 4: The Roles and Outcomes of the Interviews

Method	Description	Action cycle #	Inquiry	Result
Qualitative	Senior Agents	3	In-person Interview with 12 senior sales agents with more than 15 years of experience	Identified the related issues that contribute to the success or failure of the sales agent. How a company can support and what is missing in the sales process
Qualitative	Junior Agents	3	In-person Interview with 12 junior sales agents with less than 5 years of experience	Identified the related issues of success or failure and how a company can support them
Qualitative	Focus Group	3	In-person, with 6 groups of experienced field, operational and service managers and supervisors in three locations of Energycare, two groups in each location: GTA East (North York) GTA North (Barry) GTA West (Hamilton) Total of three hours	Identified the expectation of managers from sales agents, monthly and annual goals and targets of teams. Identified the pitfalls of each branch.
Qualitative	District Managers	3	In-person Interview with two district managers in Markham office	Identified the lost link between company and sales agents and reason of failures for their agents
Qualitative	Employees	3	Head office in Markham	Identified the roles and responsibilities of some sections and how they can better support the agents.
Qualitative	Customers	3	On-phone interviews with 10 customers that have purchased and 10 customers that have not purchased their equipment from Energycare	Identified the reason that caused customers to buy or not to buy their HVAC equipment from us.

Source: Framed by author

3.6.1 Methods of Inquiry

Narrative inquiry is an approach to gaining information through storytelling. The researcher that uses this approach writes a narrative of the experience. Using narrative technique helps retrieve information about a subject given that humans are storytelling organisms who reveal their experience individually and collectively. Narrative inquiry methods include field notes, interviews, journals, letters, autobiographies, and oral stories. Therefore, the diverse approaches in narrative inquiry are categorized by focusing on either the content or the structure. The content version of the narrative depends on interrogation, whereas the structural version emphasizes asking how a story is composed to achieve particular communicative aims. Commonplaces of temporality, sociality, and place create a framework where different field texts and analyses can be used. Narrative inquiry highlights ethical matters as well as shapes new theoretical understandings of people's experiences.

The fundamental structure of all interviews is that of a narrative form. By expressly approaching interview conversations in this manner, this study utilized a proper story structure; for example, all participants were allowed to participate by reporting occasions and encounters sequentially and arriving at a resolution. This sort of structure is anything but difficult to pursue by the questioner. It contained all components pertinent to this exploration venture. Further, talk with associates usually forms their portrayal to cover those subtleties that are imperative to them (for example, the central ideas), which were very profitable for this investigation and further inspection. The account idea of the meetings is required to diminish over the long haul after center ideas are recognized. The process involved building rapport. The rapport involved identifying the study site as well as the participants. As proposed by Fetterman in 1998, the practical net approach was established to be highly effective in that it promoted a favourable environment for the study. To whether to tape interviews or take notes, there is by all accounts an accord in the process of collecting data. However, the tapes are entirely profitable. That is, the conversations with accomplices have to concur and feel good with this process. The process logically includes this issue as regularly overestimated, just as the dread of missing certain subtleties in composed notes. A point-by-point examination of how certain statements were made is valuable for uncommon research questions. Even more frequently, as for this situation, information disclosed is of significance. Further, vital viewpoints were relied upon to recur.

3.6.2 Focus Group

Various researchers usually employ a focus group to facilitate the research process. Majorly, a focus group involves a group discussion amongst participants about a particular topic organized for research purposes. The research was guided, monitored, and recorded by the moderator. Within this context, the focus group was used to generate a rich understanding of the experience and the belief of participants. The recommended criteria for using a focus group were identical to those available in (Appendix O). Thus, it was used as a multi-method design to elaborate on the study topic and narratives that were to be used in later stages. Furthermore, it was a clarification of data collected through narrative inquiry.

The focus group comprised 6 groups of experienced field and service managers and operational managers and their supervisors. I took charge of the activities within the focus group and focused on the various locations in which Energycare operated. The process further helped align the questions based on the features and the environment in which the participants originated. In each of the three locations that the company operated, I created two groups per location and allowed the individuals to take part in the group discussions. The three areas included GTA East (North York), GTA North (Barry), and GTA West (Hamilton). The focus group discussion was carried out within a hall and took about three hours. The affectability of arrangement issues demonstrated that taping meetings probably was not satisfactory, or worse, that talk with accomplices concurred with the potentials of the participants to change their answers, similarly, yielding a one-sided view. For a similar reason, singular interviews were also utilized alongside the focus groups.

3.6.3 Interviews

The primary research process involved the semi-structured interviews that were carried out to offer critical data for the evaluation process (Flick, 2015). An interview outline is required to advance inquiry (Horrocks et al., 2019). The inquiries underneath are the primary cycle in the feeling of the iterative procedure of subjective research.

To develop the best solution for the Energycare negotiation model, we used participatory research methods. According to Chevalier & Buckles (2013), participatory research uses a combination of people-based and evidence-based research methods to develop solutions to challenges. People-based methods can better understand consumer needs and develop new niche markets that companies can satisfy and use to create a competitive edge. It is done using interviews and data collection tools with questions relevant to the issue under investigation. A sample of the interview used for this study aligns with the one in (Appendix P).

The concept of this action research is related to sales marketing and people management. Relationship-based selling is the new phase of marketing and must be improved for the prosperity of the marketing industry. People management allows an organization to effectively relate with internal and external stakeholders to maximize their potential in the business. As indicated in (Appendix N), the assessment chart was used.

This chart can be productive to gauge the level of dissatisfaction of the customers towards their existing HVAC services. The higher the rate, the greater the chances for an organization to make a new entry with fresh offers. According to Ozerdem and Bowd (2010), participatory methods are beneficial to developing relationships and problem-solving strategies developed by the input of all the people involved. This type of action research is helpful in my research as it enables the development of markets and a better understanding for all stakeholders. The process of using participatory research highly involves all participants (Appendix G). Table 5 shows the number of employees that have participated in the survey.

Table 5: Number of Employees Participating in the Survey

Position	**Interviews**
Senior Agents	12
Junior Agents	12
Sales Managers	6 (Focus group)
District Managers	2
Employees	20
Employees & customers	20
Total	72

Source: Framed by author

Throughout this procedure, the developing thoughts were compared against the rationale of the field. It is the primary concern of interpretative research. This adaptable, semi-organized meeting process, which is additionally intrinsic in the Grounded Theory technique, enabled us to address the changes following individual meeting accomplices as indicated by their talk style and aptitude in explicit regions (Lawrence, and Tar, 2013). Additionally, the thematic evaluation is underpinned by the work of Braun and Clarke (2006), which provided more specific information than the fixed survey information given. The interviews were structured to offer relevant data for analysis. The interview questions were grounded in the research questions to promote reliability and validity (Noble and Smith, 2015). The research questions are presented in (Appendix P).

3.6.4 Data Gathering Process

Primary data is a method of collecting first-hand information from the field of study. It includes determination, sampling, and representation of the population and finding out the situation of a phenomenon. Other means of collecting data include surveys, focus groups, and interviews. However, the current study employed interviews and a stratified random sample, dividing the population into subgroups with distinct groups.

The tools utilized to collect relevant information in my action research were the interviews and the focus groups. The structure of all discussions was that of a narrative form. By expressly approaching interview conversations in this manner, this study utilized a proper story structure; for example, all participants were allowed to participate by reporting occasions and encounters sequentially and arriving at a resolution. This sort of structure is anything but difficult to pursue by the questioner. It contained all components pertinent to this exploration venture. Further, talk with accomplices typically structures their portrayal to cover those subtleties that are imperative to them (for example, the central ideas), which are very profitable for this investigation and further research. The account idea of the meetings is required to diminish over the long haul after central ideas are recognized.

I had to locate the various venues in which Energycare carried out its activities. During the modules of my DBA, I learned that we needed to establish extensive rapport with participants during the data collection phase. Creswell (2013) claims that purposeful sampling and the best data collection are critical in action research. Creswell (2013) argues that doing an interview, observing data, forecasting the potential issues regarding the data collections, and characterizing them in the array that they not be lost and damaged are fundamental in research. Since the data collection was done within my company, I tried to balance my study and collect valuable data. I informed the participants about their rights, and they signed the consent form in my study and saved all the emails in a secure file and all the hard copies on a locked desk. Thus, the data collection was performed within our organization.

The meetings were recorded in tapes and notes that were transcribed into data for analysis. Even though I was aware of my company's culture, I was lucky to have a general manager of Ontario East beside me in a few focus group sessions as a "gatekeeper," a person who is a member of the same group and culture (Creswell, 2013). His appearance helped attract the full attention of participants and led to good data collection. All of the electronic files were saved in my drive and saved in my private locker. I used my digital camera for taking pictures and transferred all of them to my laptop in a safe and separate file. All documents, notes, and journals were saved on my desk, and all the participant and employee correspondence was kept in soft and hard copy in its original format. During the interview, I used my digital camera for recording, and I also took notes in the meetings.

3.6.5 Data Analysis

The method of gathering relevant information involved the qualitative frameworks, including interviews and focus groups. Before the data were fed into the statistical tools, they were coded into key themes to formulate relevant relationships, considering the various context of the cases. The coding involved categorizing the qualitative data from the primary sources. According to Mihas (2019), the coding process involved establishing the passages within the text and other data items by searching and establishing key concepts and links between the data. The process involved using the open coding process (Cope, 2016). This was the initial organization of the raw data to make sense of the information provided. Furthermore, manual coding was utilized to place the data together in various ways by making connections among the categories. It helped in establishing the key themes within the action research process.

Statistical analysis is an essential tool for describing data since it aims to provide a complete picture of the data before proceeding to the advanced methods. Therefore, the research was crucial to employ a descriptive statics type that entails graphical tools to summarize data and extract critical information. Furthermore, it helped in describing the link discovered between several variables. It was within the fact that different categories were involved, and therefore it was essential to compute their frequencies. After that, the most frequent variety was analyzed through a pie chart. According to Mihas (2019), choosing an effective descriptive statistics tool depends on the type and the number of variables as well as the objective of the analysis. Therefore, it was vital to embrace statistical analysis tools to fulfill the three criteria.

3.6.5.1 Manual Data Analysis

Collecting data and analyzing it to arrive at a valid conclusion has to pass through various phases before it can be presented. Data usually hold more information that can be interpreted in professional ways. It is easy to get diverted into various directions in research without following a systematic approach to exploring the content analysis. Therefore, content analysis can be divided into numerous steps. These steps include identifying and collecting data, determining coding categories, coding the content, verifying validity and reliability, and analyzing and presenting the results. However, when it comes to analyzing the data, the coding of content is highly considered. This is because the data were measured according to the questionnaire provided to different participants, employees, sales agents, and managers.

My research was a qualitative type, and I have done coding and content analysis manually. It was the starting point of data analysis and focused on the conducted interviews. Manual data analysis was used to acquire basic information from various participants. This was done to create a platform for understandably presenting the information. Even though the use of manual data analysis on its own does not allow a researcher to predict future results or tell the response to questions, it leaves data organized and ready to undertake the additional examination. Manual coding data was used on the basis that the research was a qualitative type. This was done through reading the data and manually developing and assigning codes and themes. This was to streamline the overall analysis process.

Manual coding of data was done using excel. The first step was to transcribe all the interviews by myself and read and re-read the transcripts several times to get a grip of the content. Afterward, the entire transcript was copied to excel with every answer, and every answer was inserted in a separate cell. All the answers, regardless of the length, were inserted in one cell. All the interview question was inserted in a separate cell. The grouping of responses was also done to make it easier to identify the respondents to the questions.

Content analysis was utilized to identify the relevant themes (Neuendorf, 2016). The content analysis involved reading and re-reading the interview transcripts to identify the similarities and variations in the development of key themes. The process involved using the coding process and arranging the data into the already identified themes. The transcripts were cut from the transcripts and placed in confined folders via the index system. Line numbers were identified to facilitate easier cross-referencing. Based on data management, excel was utilized to sort the relevant data before being categorized into relevant themes for generating key tables and critical presentations. Unlike the quantitative method, qualitative data analysis does not involve universally applicable frameworks generating results. As such, my critical reasoning and analytical skills played a significant role in analyzing the data.

3.6.6 Trustworthiness

After showing the benefits of research to higher management and explaining to them how this research could affect our company and improve the performance of our sales agents, they gave verbal approval to start, provided that the final results be shared with the board. The approval of the general manager made this research feasible. It allowed me to collect primary and secondary data and prepare myself to set up the interviews and develop the questionnaires.

I needed to make sure my action research would ethically "serve the good of the team, treat everyone the same and treat people as ends, not the means" (Coghlan and Brannick, 2014, p.524). It required more engagements with my colleagues "than debating with them and creating the polarization in the organization" (Connelly, 2016).Considering the ethical issues that were explained as “concentric cycles” (Rowan, 2000), I was conscientious not to harm the wellbeing of individuals while collecting information. I made sure to look at the participants as humans rather than variables, engage them in planning and processing the results, and have a comprehensive system inquiry encompassing everyone in general. Even though it was hard, I needed to guarantee the confidentiality of participants as we unfolded the layers of action research (Appendix C) (Williamson and Prosser, 2002). I made sure that team members were fully aware of the research goals and allowed them to withdraw from participation if they were not feeling comfortable in the face of opposition (Williamson and Prosser, 2002). I tried to keep participants' identities confidential as much as possible and keep them anonymous in research. However, “action research does not offer ethical guarantees to keep the confidentiality and anonymity of participants and protecting them from harm” (Williamson and Prosser, 2002, p.587). Therefore, I needed to discuss and negotiate such grey areas with participants before the research and make sure they understood their rights and the consequences of action research.

3.6.7 Validity and Reliability of the Study

In this context, the outcome was ideal for explaining the principled negotiation model, hence satisfactorily fitting the data of the four-factor model. Furthermore, this questionnaire was considered equally valuable, as it passed all the validity and reliability tests, forming a final formal questionnaire.

Equally important, the verification of the hypothesis of a principled negotiation and conception model of the entire findings has been finalized. The illustrated factors align with the theories of hypothesis in four dimensions based on the model of principled negotiation (Field, 2013). The interview constituted eighteen issues examined by a scale of seven points (from a state of disagreement to a state of agreement) to validate the principle of negotiation.

Tacit knowledge of the participants should ensure the internal validity of the data and make sense of the data. There was brainstorming by each participant when writing their findings on a stick-on poster to give a voice to every research question, which was done on several occasions. Posters would eventually be stuck on the wall, collectively grouped following related themes by the participants. Data analysis, as well as data generation, was then occurring concurrently. The stick-on posters addressed the specific questions of inquiry. The data analysis process was used in the categorization of data, which then resulted in themes. For my reflection and learning, I depended on the observations of the research participants as they carried on with the process of data categorization and generation regarding the data itself.

3.7 ACTION RESEARCH CYCLE FOUR: EVALUATING ACTION

The observation process involved documenting the impacts of the action. The action research enabled a more extensive range of information to be dissected, including yet not restricted to interviews, organization reports, direct perception, and secondary information.

The extraction of observational information can be troublesome. However, methodological adaptability is of great importance (Sutton and Austin, 2015). The action research strategy acquires what essentially can be viewed as an open perspective and thus is consequently suitable for investigating cooperation and correspondence forms in electronically directed business arrangements. Coghlan (2008) investigated the action research out of various up close and personally arranged contextual analyses. In contrast to other interpretative methodologies and despite progressing contentions on that point, the strategy gives a built-up set of rules and techniques for information examination, intended to include thoroughness and accuracy into a progressively developing exploratory investigation. It is more expounded and consequently more effective material than those of Ethnography and Phenomenology. As Noble and Smith (2015) phrased it, to date, the action research strategy has been broadly utilized regularly in various business research.

The reflection recalls the actions noted during the observation process. Through these applications and impressions, the action research incorporates a critical and systematic mechanism in its inquiry of the participants and members of the study. The primary objective involves identifying the situation or problem perceived by the participants. In operational utilization of the strategy, Coghlan (2008) has created diverse understandings of the theory. Both of these forms are connected at present. The researcher focused on the interpretative and relevant methods for research advancement while underlining exceedingly critical and orderly procedures. The following aspects were used in the adoption of the spirals of the action research cycle (Coghlan, 2008) by Engaging with the participants in doing a review of the generated data, Systematically giving an outcome of the research about the company through the construction of the initiative together with the research participants, Conducting collaborative data analysis, Doing a joint evaluation of the result of the action leading to further planning.

From the beginning of the study, I involved myself in routine meetings to review the data, thereby obtaining a critical appreciation of the information. Coghlan and Shani (2014) argue that the outcomes of our actions can be reviewed further to obtain essential outcomes. I was surprised by some of the outcomes; some were disappointing, and others were per my expectations. I was able to touch on some interesting points and find out some of the primary factors that contribute to the lower closing ratio of agents.

Energycare has done a poor job supporting the team of sale agents by not providing peace of mind or paving the road for a perfect visit and win-win situation. The organization also portrays the lack of a standard presentation book for the sales agents to follow the steps one by one. Such standard strategies in the negotiation process and sales presentation can help both Energycare and the company's sales agents. Energycare has operated in the Canadian market for an extended period, and some sales and marketing strategies that are embraced are still traditional and not updated. Moreover, Energycare has been operating in its comfort zone for a long time with possession of some loyal customers and a lack of serious competition. The company's traditional culture delayed some of the innovative projects that could have led to a great value proposition.

Several complications and obstacles in the sales process and negotiation strategies were noticed and discussed with participants; however, the most significant were the major concerns that I concluded to contribute to the failure of our sales agents. Each of them was carefully studied by practitioners, and appropriate remedies were recommended in the following chapters.

3.8 CHAPTER CONCLUSION

For the research's objective, it is essential to develop the best method of collecting information. Furthermore, the target group plays a vital role in this research when creating a unique and effective analysis strategy. Since the study seeks qualitative data collection, observation, interview, and action research are considered the main methods of obtaining information. Moreover, participants' viewpoints are vital within the basis of gathering information to reach an informed height. Therefore, the information sources such as internet search engines are considered in addressing the study's objective. The interview is a method of data collection that seeks trust between the interviewer and interviewee. Therefore, using this type of data collection is vital in obtaining accuracy in data evaluation. The action research cycle is also a unique research strategy since it portrays a systematic process in gathering information on a research topic. The action research cycle consists of four phases, whereby each phase seeks a varied approach to an effective data collection method. The first phase entails the construction of the research process where journaling is employed as the best method. The planning phase requires prior studies of the research topic crucial in addressing the study's objective. The third phase is the most critical phase that seeks research knowledge of obtaining data from the ground. This includes survey, focus group, case study interview, data gathering process, and coding and analysis. This phase explores the importance of taking effective action to reach the main aim of the study. After that, evaluation action is needed based on the action taken to conduct the research.

CHAPTER 4: ANALYSIS AND FINDINGS

4.1 INTRODUCTION

This section describes data by employing qualitative research standards, which entails interviewing, observation, and action research. In the qualitative stage, the data are analyzed into generative cycles, which are individually explored. Thus, the findings of this chapter are linked closely to the next chapter, which explores the evaluation and how the data illuminated addresses the research questions. Moreover, the subsequent chapter seeks to address the question of this study. Therefore, I have tried to analyze different negotiation steps in the context of Energycare and suggest some pragmatic solutions.

4.1.1 Interpretive Pattern

An interpretive paradigm was employed in the current study to perform data analysis. This was key in viewing the narrative against the context in which research was set and the participants' viewpoints. Under this perspective, research participants possess working theories of their conduct and experiences based on local knowledge, which form part of the negotiation strategies of Energycare and which matter within the context of the industry. Within the context of exploring the local theories of interpretations, the conceptual cycles that inform the actions and narratives of the participants are uncovered. Given that the theoretical outline was original psychology, I found an effective interpretive outline for the current study from the concept that it enabled me to explore the participants' viewpoints in the context of their environments.

4.1.2 Analysis process

The process of data analysis began by first understanding how to make sense of the data. This involved engaging deeply with the participants' viewpoints concerning the negotiation strategies. Then, the action research process was employed ahead to identify the critical potentials of polarizing the evaluation mechanisms, which aims at incorporating the already existing dichotomies within the context of the targeted firm. As such, the limitation of the targeted firm, which is linked to various negotiation mechanisms, is uncovered. This was done by grouping the action research into cycles and individually describing the cycles. Therefore, three cycles (refer to Figure 4) were created uniquely to seek information from numerous participants to fulfill the research's purpose. Interviews were used as the primary tool for gathering the intended information concerning the subject within the cycles. Afterward, the participant's data were coded.

4.2 FINDINGS OF CYCLES

A holistic chart about the responsibilities of both company and the sales agent was created in the beginning. Some of the issues addressed concerning the company's responsibility include; hiring, training, supporting, servicing, motivating, and updating. In the hiring segment, it is obtained that the company is responsible for hiring sales agents with a technical background and preferably license technicians who want to work as sales agents. It is done by creating several meetings to introduce staff and technicians to sales agents. Training responsibilities explore training for sales agents to familiarize them with new equipment and sales techniques, and technical points. It helps boost the confidence of sales agents with their recognitions. Also, train the sales agents to ask for the customer to deal with several negotiation points. The company is responsible for supporting sales agents by providing them with readily tools and working conditions for sales agents to use in a sales presentation. Servicing is a responsibility for the company by ensuring that all the equipment is in stock for installation. Moreover, the company is responsible for motivating sales agents through paying good incentives and commissions to reward sales agents for winning customers.

On the other hand, the responsibilities include communicating, being loyal, productive, active, and intelligent. These responsibilities were obtained as a critical determinant to contributing to the success of the sales agent. It was observed that the sales agent should be responsible for communicating with technicians concerning their daily progress. Besides, their communication responsibility is extended to the customer's level when negotiating. It is also obtained that the sales agents should be loyal to the company by ensuring all the rules and regulations are followed and engaging throughout the training process. They are also responsible for identifying any errors made; therefore, be intelligent enough to identify the errors through asking. Besides they should have a greater connection with all staff to know whom and refer to any potation issue to raise sales presentations.

All participants believed that all of the mentioned responsibilities are equally important and should not be ignored. Both the company and sales agents play a critical role in this process, and none of the responsibilities should be overlooked. Participants had different opinions and came to numerous roles and duties, some similar and some different; I wrote the most critical ones in appendix Q. The appendix shows the results of the initial meetings about some critical responsibilities for both agents and the company.

The evaluation of the above responsibilities was the first step for me to take action. In this process, participants got a chance to have a general evaluation of their performance first to find the current issue and second, trace it to find the source of problems. Most of the participants, primarily sales agents and sales managers, blamed themselves for lower negotiation performance. In the meantime, they continued blaming the organization for the existing issues and believed that it would be almost impossible to achieve better without removing such obstacles. After studying and evaluating the responsibilities, we all agreed that the success of agents and the company are integrated. It is almost impossible to promote a negotiation framework for service firms without considering the responsibilities of both parties.

The success of the company is related to many internal and external factors (Elshenawy, 2010). The smooth operation of all divisions aiming to create maximum value to increase efficiency is critical in this process. My interviews with employees and peer colleagues helped me better understand the different layers of the company. They allowed me to work on more practical solutions in my action research.

The information collected from the focus group expanded the scope of my action research. It helped us study the performance of other departments that work closely with sales agents and directly impact our customers' decision-making. We assured management that findings of this research would be provided to Energycare and that the practical solutions recommended would help all of us to have a different concept of negotiation. It surely can help focus on multiple pitfalls of operation and notify the system that has been in its comfort zone for an extended period of operation. After the first meetings of my action research, I noticed that I should expand my action research to three critical factors that are inseparable, and all have a critical role in the success of both sales agents and the company. Integrating these and expanding my investigation of the three cases of my action research allowed me to step into different domains. Besides recommending related negotiation techniques, add some different aspects to the negotiation process for our service companies, particularly HVAC organizations. The subject cases of this action research, as we investigated, are not being practiced by all of the major service companies in Ontario. Even though some of them have tried similar strategies on marketing, none of them are complete as our recommendation in the model. Some initial investments, training courses, and robust company infrastructures are various attributed factors. Suppose managers commit to the initial investment of our recommended projects. In that case, we could be among the first ones who take advantage of systematic training and customized monitoring systems in local HVAC and service companies.

The following three major subjects were seriously analyzed and evaluated in our action research:

- Cycle (#3A): Systematic presentation & negotiation techniques.
- Cycle (#3B): Value propositioning (smart thermostat)
- Cycle (#3C): No money, no worry (Rental HVAC equipment versus buying)

4.3 ACTION RESEARCH CYCLE (#3A): SYSTEMATIC PRESENTATION & NEGOTIATION TECHNIQUES.

In this part of the research, which was performed in the first section of the third cycle, I tried to address the first few questions of our action research.

1. Is technical knowledge or sales knowledge alone enough to sell HVAC products? Or, do sales agents need to be equipped with outstanding negotiation techniques?

2. What is the meaning of negotiation? How can different layers of the organization help agents to be successful? Do sales agents need to be equipped with special negotiation techniques?

3. Is it beneficial for established and large companies to have a long-term investment in agents, and for them to stop hiring seasonal salesmen?
4. How important is it to train sales agents and qualify them with negotiation strategies? What type of training is required for sales agents to be ready to go through all the steps of a sales presentation and win customers?

Energycare organization has been in business for an extended period. Due to excellent service and professionally licensed technicians, the company has many loyal customers, mainly in the range of 40 - 80 years of age (Energycare, 2019). Being one of the biggest service providers in Canada for a long time and offering service and protection plans for HVAC appliances, plumbing, electrical, and related services can be among the best reasons for having good numbers of loyal customers.

Some of our customers have inherited the service plans for their equipment from their parents. They have kept the plans since the package fees are lower than newer ones. The children try to keep their parents' plans since if they cancel it, in the case that they needed it again, they would have to buy it for a new higher price.

Being the first game player in-service expert business, having a lower level of competition, and retaining highly experienced technicians for service and installation are among the best reasons that helped Energycare and similar organizations grow and expand their territories. Furthermore, Energycare is an ethical company and always does its best to serve the customer with honesty and integrity. Our customers are thrilled with our team's performance, and in most after-service surveys, our technicians and employees receive excellent ratings. The company takes such ratings very seriously and has action plans to fix the pitfalls of customer service. The high number of service customers for an extended period has helped Energycare to grow to some other sections like plumbing, electrical, and water softener services besides HVAC service. However, the competition is growing every day, and other companies endeavour to take more pieces of the pie. Some of them are trying to copy the Energycare model and start to offer the same service plans as Energycare at even slightly better prices. Most of Energycare's sales agents enjoy working in this company and have been employed in this role for at least ten years.

In three loops of my action research third cycle, I asked several related questions to my action research that got me deeper into my subjects and better understood my subjects of interest. The data questions are closely connected to my action research questions and led me to drive a better conclusion from the issue. Some results of my analysis are quoted in several tables in Appendix (R).

1. **Finding Based on RQ1**

The first question was about the working period of employees in Energycare. This included their experience working with the company and how they feel about their engagements in the team of Energycare. These questions reflected on the first action research question which states "Is it beneficial for established and large companies to have a long-term investment in agents, and for them to stop hiring seasonal salesmen?"

From the above question, senior sales agents (SA1, SA2, SA3, SA4, SA5, SA6, SA7, and SA8) all believed that they are not planning to leave the company. For example, SA2 said, "I have worked in Energycare for more than 15 years and I am not planning to leave the company. Similarly, SA5 said, "I have tried a few other opportunities, but I couldn't find a better place to work as a sale agent than Energycare." Out of the 12 junior sales agents interviewed with less than five years of experience, JA9, JA10, JA11, and JA12 believed that they enjoy working with a team of Energycare. For example, JA9 said, “I was working for other companies but unfortunately, the number of leads was not enough, and I always should do some extra marketing push to generate some additional lead for myself.” And JA12 said, “the volume of sales and number of loyal customers make my job much easier here and definitely can make much more money in Energycare”. I interviewed groups of experienced personnel including field Manager (FM), District Manager (DM), Sale manager (SM) and supervisors in two locations of Energycare which indicated they previously worked for other companies and were unhappy. Out of the 10 customers who have purchased the company's products, customers (CU3, CU4, CU6, CU7, CU8, CU9 and CU18) have recommended other individuals to purchase Energycare's products. For example, CU13 said, “I referred my brother and my neighbour to take advantage of the deal and professional installation of Energycare and purchase new furnace”. In comparison, customers (CU14, CU2, CU15, CU16, CU17 and CU20) out of the 10 customers who have not purchased Energycare's products showed that they would like to purchase from Energycare but find the same products with better price from competition. The Senior manager of the office in the city of Markham indicated that “I am pleased working in Energycare comparing with my previous experiences in previous job place “Reliance Home Comfort”. One of the two district managers (DM1) interviewed demonstrates that it is good to work in this company, but some strategies are not healthy. The other district managers (DM2) interviewed stated that it is okay to work for Energycare, but most corporations have their issues. Out of the 12 senior sales agents interviewed, SA4, SA5, SA8, and, SA11 indicated that they were pleased working with Energycare but thought that Energycare could improve their income.

"Sale leads" is another critical factor for sale agents that how is generated. Typically, sales agents in the HVAC industry receive their leads from the company and visit customers in their homes to sell them either a new product or a new service. Sales leads are either "Out-Bounding," which one of our agents in the customer service department calls customers, explains the existing promotions of the company, and asks if they are interested in booking an appointment with one of our agents for a consultation. In this situation, customers usually have not planned to change their existing equipment unless a sales agent or energy management consultant can convince them that it is beneficial to purchase a new one. On the other hand, sales leads can be "In-Bounding" as well, in which case the customer calls us personally to book an appointment; they are either in an urgent situation to replace their equipment or plan to do it in the near future. Even though in-bounding customers are not easy, it is much easier for the sales agents to negotiate with this type of customer to sell than Out-Bounding customers. Unfortunately, as the marketing manager believed, the closing ratio of our agents in such marketing leads has a short range of 25-30 percent.

There is also another type of lead that service technicians provide and is called "Technician-lead." As it is clear from its name, service technicians create such leads when they meet customers and decide that their equipment should be changed. With this type of lead, the sales agent has a higher chance to win the customer since most of the time, the customer has some problematic situation, and the technician has advised them to talk with our agents and purchase new equipment. Our agent's closing ratio in Tech leads is about 65-75 percent. The percentage of sales leads are shown in Figure 5.

As is shown in Figure 5, the percentage of Tech leads is about 34% of the total, which is statistically significant according to marketing experts. Even though Tech leads are solid, as shown above, the majority of our leads, which were about 66% of the total, came from marketing sources. Agents have an excellent closing ratio in Tech leads, but unfortunately, they struggle in marketing ones.

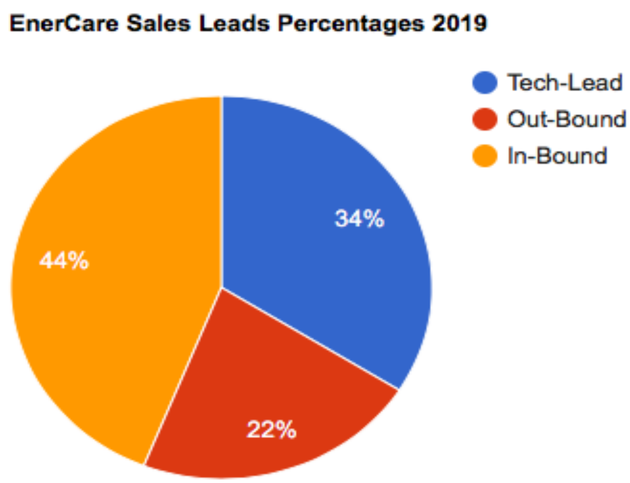

Figure 5: Energycare Sales Leads Percentage of (2019)

Source: Energycare Home Service (2019)

2. Finding Based on RQ2

In reflection of second question of action research: “If you have two leads at the same time, one marketing lead and one Tech lead, which one do you pursue?” this reflect Research question two: How important training is to qualify sale agents for negotiation with all type of customers in any type of lead?

Out of the 12 senior sales agents interviewed, 10 (SA2, SA4, SA5, SA6, SA7, SA8, SA9, SA10, SA11, and SA12) indicated that they just run the tech lead and they are not interested in marketing lead. Out of the 12 junior sales agents interviewed with less than five years of experience, 11 (JA1, JA2, JA3, JA4, JA5, JA6, JA7, JA8, JA9, JA10, and JA12) showed that they do not care for marketing leads when they are busy with other leads. The interviewed groups of experienced Sales Managers (SM), and District managers (DM) in three locations of Energycare all agreed that the sales agents of their office are always busy with tech leads and they always try to avoid the marketing ones. The District manager (DM1) in Markham branch stated that “I am completely aware that it is hard to run two leads simultaneously, but tech lead customers are serious and want to purchase fast, However, the marketing leads are not easy and tough to sell”. The other district manager (DM2) interview shows that both tech-lead and marketing are essential, but tech leads are prioritized. DM1 revealed that some sales agents try to call the marketing leads and reschedule to another time. Question about if they have another tech lead simultaneously; out of12 senior sales agents interviewed, SA1, SA3, SA4, SA6, SA7, SA8, and SA9 indicated that both are important to them, but tech leads are more urgent.

Interestingly, most agents said they would pursue both of them but could call the marketing one and change the estimated arrival time. They believe that both leads have great potential and cannot predict the results before visiting customers and presentations. This showed that our sales agents are prepared to go after all types of leads and always hope to win them and sign a new contract. However, their expectations with Tech leads are higher because of customer urgency. Usually, customers in this situation have broken or irreparable equipment and are ready to purchase new equipment fast. Sales agents benefit from the customers' urgency, mainly in the very cold or scorching days of the year, by easily convincing them to purchase the new products and promising same or next-day installation. As I have mentioned, Energycare has many loyal customers, and most of them have either annual or monthly protection and maintenance plans with our company. Considering the number of customers, sales agents have an excellent chance to have a few Tech-leads each week or even each day. Such promising leads guarantee reasonable revenues for most agents regularly. Therefore, they might not be eager enough to win the challenging customers of In-bounding or Out-bounding leads.

3. Finding Based on RQ3

In reflection of research question 3: “What is the meaning of negotiation? How can different layers of the organization help agents to be successful?” I tried to get deeper and asked, “Is there any chance you would give the customer a quotation over the phone?” which could explain how important is for agents to negotiate with them in a comprehensive and systematic sale presentation.

One of the 12 senior sales agents SA10and SA4 stated that they never give their customer any quotation over the phone. In comparison, SA1, SA6, SA7, and SA11 indicated that they contacted their customers over the phone several times and provide them with a price. SA3 and SA12 showed that they reach customers over the phone but do not give them a price over the phone. Instead, they indicated that they tried to make another appointment. SA5 stated that “all customers are important.” Therefore, “I tried to lowball them on the phone and make another appointment to visit them later”. SA8 said “I call my marketing leads most of the time, and if they ask for the price, I give them a range over the phone”. SA4 said “I call my customers but don’t give them any price”. In contrast, the last interviewee (SA2) said “it is hard to say, it depends on the customer, but if I notice it is wasting time, I call and quote them over the phone”.

The Same question was asked from junior agents. Two of them (JA1, and JA10) stated that they do not provide any customer quotation over the phone. In comparison, JA5, JA11, and JA12 indicated that marketing leads are wasting time and they try to qualify their customers over the phone and give them prices over the phone. JA2 said “I qualify my customers over the phone, try not to give them any price, instead I try to make another appointment and run it when I am not busy with tech leads”. JA8 stated that “It does not make any difference for me, business is business, too me all customers have the potential of buying at least one equipment otherwise they never call us”. JA3, JA4 and JA6 indicated that they always try to call their marketing leads before their appointment, evaluate them and pick and choose serious customers. JA7 said, “I call my customers but do not give them any price”. In contrast, JA9 stated that “it is hard to say, it depends on the customer, but if I notice it is wasting time, I call and quote them over the phone”.

In a few interviews with sales agents, a few of them complained that “when they are busy, they are not even interested in marketing leads and try to skip them.” They claimed, “There were numerous occasions they ignored some Out-bounding customers and did not visit them and give them quotation over the phone.” Sales agents are not allowed to evaluate the customer's equipment without visiting the furnace room. “Sales negotiation should be face to face, and the presentation should be in the customer’s house in front of decision-makers,” as the sales manager always says. One of the reasons that most of the agents of Energycare have lower closing ratios, particularly of Inbound and Out-Bound calls, can be traced to Tech-leads that spoil them with easy customers who rush to buy their equipment fast and be installed the same day. Even though they can obtain their equipment from another competitor, most prefer that only Energycare install their equipment and do not consider other options. Tech-leads are very critical for Energycare managers since a significant portion of their revenue comes from this line. Tech Managers offer their technicians lucrative commissions to produce the Tech-leads and persuade them to generate more by recognizing them and increasing their bonuses. Even though it is an excellent approach for revenue generation, it is not enough. Energycare endeavours to improve the total revenue by increasing the sales volume of marketing leads. Besides the tech leads, Energycare needs to implement the right strategies to improve the sales from In-bound and Out-bound sources. A company cannot rely heavily only on Tech-leads and lose other opportunities. Unfortunately, as one of the sales managers believed, “the closing ratios of our agents in marketing leads are about 30% lower than most of the other competitors; considering the total marketing leads of the company, this figure proves that Energycare keeps losing a company lot of potential customers”. Even though numerous alarming reports emphasize the existing concern almost every quarter of the year, it seems sales managers still do not feel the urgency of changes in this section and hope that hiring more efficient sales agents will improve the numbers and change the results.

My next question reflects on the fourth question of action research:

4. Finding Based on RQ4

In reflection of question 4 of action research: “How important is it for agents to control moments of negotiation and react accordingly?”

In this part I asked them: “Do you have a standard presentation book?” and “Does your book cover all the subjects that need to be explained?” and: “How can pictures and videos help in presentations?”

Out of the 72 interviewed individuals, SA1, SA2, SA8, SA9, JA4, JA6, JA9, JA12, indicated that they did not have a standard presentation book at all. To reply to the question that “Does your book cover all the subjects that need to be explained?” SM1, SM4, CU3, CU6, CU17, CU8, CU9, CU20, EM1, EM2, EM3, and EM5 did not agree at all since they believe the presentation book missed a lot of major factors and important points.SA2, SA3, SA9, JA1, JA2, JA3, JA5, and JA10 indicated that they always explain a lot more from their slides to customers.SA7, SA5, SA6, SA12, SA5, said they never use the Energycare presentation book and, CU5,CU8,CU9, CU11, and CU20 indicated that their sales agent never shows them the Energycare presentation book. SA1, SA4, SA6 and JA2, JA4 indicated that they have the presentation book but they never use it at all. JA1 said "the presentation book is just a joke, I left it in my office and never use it". On the question of whether the presentation books covers all the exercise 10 (SM6, EM12, EM13, EM20, CU5, CU11, SA5, SA6, SA7, and DM1) gave "not at all" as their answer, SA1, SA2, SA8, JA12, EM7, EM10, CU1, SM1, SM4, CU3, CU4, CU6, CU9, EM2, and EM3 gave "no" as their answer, 12(SA9, JA4, JA6, JA9, CU10, EM1, EM5, CU8, CU2, CU13, CU15, and J12) gave "not really" as their answer, 5 (CU12, CU14, CU16, EM9, and DM2) gave "never" as their answer, 10 (EM15, EM16, CU3, CU17, CU18, CU19, CU20, EM6, EM14, and JA10) gave "I think so" as their answer and 20 (JA2, JA3, JA5, JA7, JA8, JA11, SA3, SA4, SA10, SA11, SA12, EM11, EM4, EM18, EM19, EM17, CU7, CU10, SM2, and SM5) said that Energycare presentation books is not good enough and need to be updated. On the question of how pictures and videos can help the participants, 15 (SA1, JA3, JA5, JA7, JA8, JA11, SA3, SM1, SM4, CU3, CU4, CU6, CU9, EM2, and EM3) participants indicated that they are accommodating, 10 (SM6, EM15, EM14, EM20, CU5, CU8, CU2, CU13, CU15, and J12) stated that it is good to have pictures and video to show customers, 15 (CU12, CU14, CU16, EM9, DM2, JA1, EM12, EM13, EM6, CU18, CU19, SA5, SA6, SA7, and DM1) stated that it makes no difference, 20 (JA2, SA4, SA2, SA8, JA12, EM7, EM10, CU1, SA10, SA11, SA12, EM11, EM4, EM18, EM19, EM17, CU7, CU17, SM2, and SM5) indicated that they are very efficient and beneficial, and 12 (SA9, JA4, JA6, JA9, CU10, EM1, EM5, CU11, CU20, EM16, EM8, and SM3) indicated that it helped them a lot in the presentation.

We noticed that a few sales agents do not even have sales presentations. “I go through the sales process and negotiation stages based on my experience; I don’t have any presentation book,” (JA11). “I have faith in the buyer” and “I create values in products, raise interest in them, create demand and then they tell me their priorities, then we start to negotiate,” (JA7). The marketing department of Energycare provided a presentation book almost 12 years ago and the same version is kept distributing to all new members and has not upgraded the contents and the materials. Since then, new hires have also received the same book with no change at all. “When there is a connection, we focus on balancing everything. This includes defining a plan that involves maintaining trust between us,” After a few hours of discussion and evaluations, participants recommended several practical solutions that can easily be implemented and address some of the obstacles. “We believe in some measured key plans that can save a lot of leads for the company.” Some of the critical factors were monitoring the distribution of Tech-leads among the successful agents strategically and creating a systematic measure plan that forces the agents to take the marketing leads more seriously.

In several meetings, we discussed that our sales agents are not comfortable in sales presentation and negotiation techniques to deal with marketing leads, primarily outbound customers. As I have explained, the Tech-lead availability allows agents to make good commissions already and not feel an urgency to develop sales techniques that better prepare them for negotiation. After some investigation, we noticed that some HVAC companies do not give any tech-leads to their agents, and technicians deal with customers directly. That is why their sales agents have much better performance compared to ours at Energycare. One of the sales managers in focus group interviews believed that sales agents of some other companies “work hard to make a lead, that is why they are more appreciative of leads, and their negotiation skills made them more prepared to deal with more challenging customers." Old companies like Energycare that need to compete among the new generation of rivals should work harder to change their sales strategies and fast. Managers should equip their agents with tools and techniques to help them step by step in a measured and standard procedure to improve their performance. After a long hour of discussion with participants, I provided some great recommendations to help Energycare and similar service companies, which have the same sales strategies, improve the sales ratio and prepare their agents for challenging customers. The recommendations are offered in my action research reflections in the next chapter.

4.4 ACTION RESEARCH CYCLE (#3B) VALUE POSITIONING

This part covers the value propositioning in negotiation that reflects on the fifth question of my action research: "Why do sales agents need to focus on value creation versus price?"

I have tried to be focused and make it more relevant to the Energycare negotiation process. Customers need to know what they are getting for their money and why they should pay a premium for the same product they can perhaps obtain cheaper elsewhere. They should be justified and completely understand Why are they paying a premium price for the same product and services? And why do sales agents need to focus on value creation versus price?

5. **Finding Based on RQ5**

On the question of "how important value propositioning is and why do sales agents need to focus on value creation versus price?"SA1, SA2 and SA8 indicated that they can only sell the product by adding values and install qualities and there is no other way around to lock the deals. SA10 and SA11 indicated that they are pretty sure it can help them to close deals. SA9 and SA12 stated that "Value propositioning is essential to justify the higher prices."SA3said" Energycare high prices are just because of value-added and higher quality and top-notch standards". SA4, SA5 and SA7 believed that it is imperative, and SA6 said that "if Energycare's sales agents do not inform customers about values, we lose the business."

Regarding what participants recommend adding value, SA4 and SA8 indicated that they recommend top-quality installations, several divisions under one operation for all customer needs and 24/7 customer service. JA5 gave Q & A inspections (Appendix J) as the answer. JA3 and JA6 indicated that it is imperative to justify the higher prices. JA2 and JA7 gave their answers as good customer service, significant installations, and knowledgeable technicians. JA1 and JA9 gave their answers as Energycare financing, customer service; install team, and best quality. JA10 and JA12 gave high-quality install, hi-tech services as their answers, and JA11 indicated several divisions like plumbing, electrical, securities, and IT solutions.

As I have mentioned in the previous section, Energycare's prices are about 10-20 percent higher than smaller-sized companies and some of their competitors. The higher cost of operation, including the fixed and variable costs, can be blamed for much higher ticket prices. I had six participants in this cycle. Most of them believed that one of the significant factors contributing to a lower closing ratio of the sales agents is the higher price of equipment in our company.

6. Finding Based on RQ5(2)

On the question of how higher list price affects the closing ratio? Which again reflects on action research question five "why sales agents need to focus on value creation versus price?"

DM1 and DM2 indicated that the prices of Energycare are almost double compared to small companies. SA2 stated that "I mostly lose customers because of the price, otherwise, customers love to buy from Energycare". The two district managers also indicated that their prices are high, and we can barely compete. JA3, JA5, JA6 andSA1, SA2, SA11 indicated that price is not issued for them since they always sell the company values. DM1 and DM2 also indicated that they do their best to avoid the price issue with value-adding, and they wish that Energycare could adjust the prices at least 20% since the list price is very high. They believed that in almost all the sales meetings, sales managers complain about the low closing rate of agents, and they justify the failure with the high-ticket price of equipment. They believed that in almost all the sales meetings, sales managers complain about the lower closing rate of agents, and they justify the failure with the high-ticket price of equipment.

As indicated by SM3: “I cannot allow other suppliers to have access to my buyers.” SM6 claimed that: “On certain occasions, it is worth sacrificing something to avoid providing an opportunity for various competitors.”

After interviews and focus groups, we all agreed that, like other big corporations, the cost of our operation is higher than most of the smaller competitors. Unfortunately, there is no way to diminish the costs, and we cannot offer our service and equipment at less than the recommended margin of our price lists. The marketing department of Energycare has some frequent basic and standard promotions, discount packages, and combo deals. Even though they are good to have, most of the agents claimed in several interviews that such promotions are very bland and not enough to win the customers. Energycare’s marketing strategy is targeting the customers with higher standards and the ones who are looking for professional installation and services. Energycare has great technicians for both installation and services, and our installation standards are higher than other companies.

We have an impressive inspection checklist for installers to perform that makes them go the extra mile in their installation to ensure that the equipment is installed according to the manufacturer and Energycare standards (Please see Q&A checklist in Appendix J). In interviewing the customers, most who purchased their equipment from us claimed that a higher standard of services and professional installation persuaded them to pay more and purchase from us. Energycare has been very successful at developing and maintaining a capable installation system in the last decades. However, it has not been seriously following some strategies for practical value propositioning.

SM5 claimed that: "The situation is entirely competitive. Various individuals try to implement similar strategies as us. However, we are people with business control. However, when the clients are highly negotiators, it is easy for us to lose out accounts".

7. **Finding Based on RQ5(3)**

In reflection of the value proposition, I asked another question that: "How can we compete in the market by adding value to our products and packages?"

JA1, JA2, JA3, SA8, SA9, SA10, and SA11 indicated that the existing strategies in value propositioning are not helpful and not helping them a lot. JA8, JA9, JA10, SA2, and SA3 showed that Energycare has the same promo almost identical season and is keep repetitive.JA6, JA7 and SA12 indicated that Energycare could do a much better job in value propositioning but not doing anything extraordinary in the last 8 years of working experience. JA12 said, "value addition is not good enough". JA4 indicated that "the promos are ok, but all the competitions have the same promos and we cannot distinguish our company from others". JA5, JA11, SA4, and SA5 showed that they should be more aggressive in value-adding and differentiate themselves from competitors.

Participants were not satisfied with the current strategies of the marketing department. They believed that Energycare copies other competitions' strategies and follows them in the value proposition in best practices. Energycare has many resources and competencies which have great potential to add customer value to its products and can come up with some complete solutions that can barely be offered by competitors and win customers not with price but value propositioning.

In most of the interviews, I heard that managers argue that agents need to sell the company, not just the price; however, they never get deep into solutions and develop unique innovations. To tackle such a crucial subject, we held several meetings with employees, participants, and peer colleagues to discuss some related issues to offer some solutions. D'Andrea (2005) argues that sales representatives who create value help in improving the ROI of the organization. This has helped us develop some recommendations for Energycare's value propositioning that can improve the bargaining power of our sales agents. Participants took their time to evaluate all of the requests one by one and shortlist the most practical solutions. We asked field managers to investigate the feasibility of the proposals by some specialists of the company. We needed to ensure that our solutions could be smoothly adapted and implemented in line with installation after receiving management approval. After several lengthy meetings, the participants' engagement resulted in some workable solutions. Considering the competencies and resources of Energycare, some practical solutions were recommended, and the "Custom Thermostat & Monitoring System" program was selected from among all the recommendations. It was stated as the most valuable product that can be built and presented to our customers. As is explained in my action research reflection, the valuable features of such a system address some of the current concerns of our customers innovatively, and it is hard to copy by small competitors. As it is mentioned in the literature review (D'Andrea, 2005) believes, to be successful, sales agents should focus on value creation and the highest return on investment. He believes that sales agents need to negotiate with customers to ask more and create value. Such value propositioning is impossible if it does not support its agents with new products and innovative services. Companies all sell the same type of commodities; however, better value propositioning has a much better chance to succeed and win their customers.

4.5 ACTION RESEARCH CYCLE (#3C) NO MONEY, NO WORRIES

This cycle of action research was very time-consuming; I tried to reflect on the sixth question of my action research: "How can the company support the sales agents in the sales presentation and negotiation process? "And "how important is it that parties of negotiation trust each other?"

Because of this section's sensitivity and technical aspect, we had to engage several managers from different departments of Energycare to contribute to the action research. I had seven participants in this part, and they were fully engaged in this part of the action research. This part addresses a good number of questions, including the sixth question of action research.

8. Finding Based on RQ6

"How do you promote win-win situations?" and: "How can the company support the sales agents in the sales presentation and negotiation process?

The two district managers indicated that they try to make sure they get what they want on how the company promotes win-win negotiation. DM1 suggested that the company promote win-win negotiation by adding value and giving them a discount in price. 11 senior sales agents (SA1, SA2, SA3, SA4, SA5, SA6, SA7, SA8, SA9, SA10, and SA12) agreed that they try to convince customers that they are getting the best value for their money without hurting their margin of benefit. SA11 stated that “it is hard to do it in Energycare.”This Participant indicated that “It was ok when working for a smaller company but not easy in Energycare” JA7, JA8 and JA9 showed that they work on a price and give their customers many discounts, but most of the time does not work. JA1, JA3, JA4, JA5, JA11, JA12 indicated that they try to help customers choose the best product and educate them with the best solutions. JA2, JA6, JA10 stated that it is hard for them to promote win-win negotiation and not offer them a lower price.

Regarding how the company can help in value propositioning, SA11 said” company could benefit from discount prepositioning through better services and better prices.” Surprisingly, almost all junior sales agents agreed that value propositioning can be obtained by offering unique products. SA4 and SA6 senior sales agents indicated that value propositioning can be achieved by keeping the quality of installation at a better price. The response given by the SA7 senior sales agent was that he always has a challenge with justifying the price with customers. The answer given by SA1, SA9 and SA10 was the best quality and service lower price.

“I am not highly collaborative. I believe that I am harder within the negotiation process. I always try to play the win-win game” Kemper and Deufel (2018), in an article “How the Situation of purchase Affects the payment method Choice in online shopping,” explain that the situation in which a customer places an order has a direct impact on their payment method. This research is based on almost a million actual customers in 2016 from a European online retailer. Kemper and Deufel (2018) conclude in the study that “deferral payment” is a new payment method that customers are engaging in versus credit card or cash payment. The authors believe that companies can extend their business by offering new deferral payments, especially online companies. Energycare has a solid and robust financing backbone and has provided financing to customers for a long time.

In another interesting article, Miao et al. (2016) compare customers' options on leasing or buying electric vehicles. The authors argue that the cost of maintenance and repairs of electric cars after purchase affects the customers' decision-making. Miao et al. (2016) claim that if buyers have a good understanding of the underlying risks of maintenance and choose to lease the vehicles, it would be much more difficult for a manufacturer to sell electric cars. This is very true regarding the cost of maintenance and repairs of the new version of high-efficiency HVAC equipment. The manufacturer was able to increase the efficiency of some of them by up to 98 percent, but unfortunately, the various accoutrements have made them very vulnerable and sensitive. Older equipment is built to last for a long time, whereas the average life cycle for the new versions of HVAC equipment can be much less than the older versions. The new equipment parts are costly, and the manufacturer requires annual maintenance to honour the warranty. An extended warranty is typically also costly, and even if the customer buys it with the equipment, it is limited and does not cover some parts, such as the heat exchanger. (Please see manufactory warranty in Appendix K). Considering the cost of equipment maintenance from one side and the cost of operation from the other side, it would make it much more difficult for customers to purchase our equipment.

According to the marketing manager of Energycare, “our sales price is about 20-40 percent higher than other competitors.” Sales representatives can barely justify the higher price, especially if the customers have shopped around and have a few comparisons. Cost of operations, size of the company, number of employees, union policies, and several other factors contribute to the higher prices of our corporation. One of the SA3 explained, “My situation always involves win-win, taking into account the satisfaction I provide." Prices are set according to numerous standards and criteria, including the acceptable margin requirement set by management. SA11 claimed that: "Sometimes it is worth going through the struggles so that I do not give up and do not allow room for my rivals."

However, service companies can implement innovative strategies to integrate customers' needs with their competencies and balance them with practical solutions. (Kemper and Deufel, 2018). For instance, the SA9 first implemented the collaborative strategy. Later on, the negotiator used a collaborative framework, which was noted in his speech: "I said to the customer it was not good on my side, and the participant noticed that it had to be good on my side. So, the participant began to carry out some analysis, and after a few minutes, we struck the deal," SA12.

Our third cycle of taking action in my research planned to address this obstacle. So, we decided to come with another cycle in this action research to discuss different angles of this issue and offer some practical recommendations that might help our sales agents improve their negotiation success rate.

The first round of discussion was the pivot around the axel of: "Are Energycare promotions and marketing effective?" and "How we can reduce the prices?" but very soon, we found out that such discussion was going nowhere. We should have found the solutions somewhere else. Energycare prices are not negotiable, and sales agents do not have very much margin to work. The participants' serious engagements unfolded different layers of this severe obstacle. Even though we had several hours of very constructive discussions, we could not offer any practical solution by then. The hidden layers of this puzzle unfolded in separate meetings. However, anytime we felt we were getting closer to some answers, another obstacle turned up.

We realized that it was almost impossible to come with some easy solutions, which were to slash the price and lower the price list. However, we found out it might be possible to apply the rental water heater strategy for HVAC equipment. Energycare has been renting water heaters to Canadian homeowners for an extended period. Even though Energycare has an excellent infrastructure to rent the HVAC equipment parallel to its rental water heaters, it has not successfully implemented the right strategies to do it. A few trials in which managers laid out some action plans to push sales agents to offer rental packages. However, it was not very successful and failed in the initial phase of operation. High monthly payments, a lengthy rental term, and extra maintenance costs were among the critical factors of failure, which led me to the next question.

9. **Finding Based on RQ6(2)**

"How does the company help you in your negotiation?", which again reflects on question sixth of action research "How can the company support the sales agents in the sales presentation and negotiation process?"

On the question of how the company can help in negotiation: 16 participants (JA1, JA2, JA3, JA4, JA5, JA6, JA7, JA8, SA10, SA11, SA12, EM1, EM2, EM9, EM4, EM18, EM20, CU7, CU19, DM2 and SM6) indicated that the company could benefit in price, the flexibility of install, offering new products. 12 participants (SM1, SA12, SA7, JA11, JA9, SM3, SM4, CU11, CU12, CU13, DM2, and SM2) stated that it could provide better services and lower costs. 9 interviewees (EM17, EM12, EM8, JA5, JA6, JA7, SM3, SM4, and DM1) indicated that it could be competitive with price and support agents with admin help. 12interviewees (EM1, EM4, SM5, EM13, SM2, SM1, JA12, SA5, SA6, SA8, SA9, and SA11) all agreed and suggested that the company can help agents by introducing new products and services and promote them with great marketing strategies to attract new customers. (. EM10, EM15, EM16, SM5, SM3, and SM4) indicated that they only want the company to be competitive. (JA9, JA10, JA11, SA5, SA6, SA7, SA8, SA9, CU1, CU 2, CU5, and CU6) stated that they only need better prices the rest is ok with them and they can deal with it. EM5, EM18, EM19, SM1, and SM2 indicated that they are proud of their services and job quality but have difficulty justifying the cost.

The participation of sales agents and the contribution of finance managers and service supervisors allowed us to dig into previous rental programs and develop a more comprehensive HVAC rental solution that targets a more significant range of customers and offers better solutions. After several meetings and discussions, with some minor changes to existing financial plans, we came up with a "Rental versus Purchase." The recommended rental package includes installing, services, and maintaining the equipment installed for 15 years instead of an older model for 10. It offers peace of mind to customers for any potential repair and services. The proposed solution is almost similar to the standard financing plan of Energycare. We just added the warranty, included service maintenance, and increased the monthly payments to 15 years versus 10 years to reduce monthly payments. When I asked:

10. Finding Based on RQ2(2)

"What experiences have you had with meeting targeted sales?" I tried to reflect on the second question of action research. What kind of training is required to improve negotiation skills? How does one determine the length and material of training?

One the question of how the correspondents meet their needs: SA4 and SA10 indicated that their needs are met through meeting their targets. Still, at times it is hard. SA3, SA11, and SA12 said their target goals are less than their sale revenues in the previous company employed.

Still, they indicate that it is customary in Energycare. SA1said "meeting the manager's target is challenging but doable".SA9 demonstrated that although it is okay to meet one's targets and goals, it is more efficient to work with customers on sales price since according to his experience it can lead to a 20% increase. SA5 indicated that the participant is always behind the target. Still, the participant considers that to be the norm. SA6 and SA7 showed that the marks in Energycare comparing to prices are not reasonable. SA8 said that the participant does his best to achieve his most tech leads target, not marketing ones. JA1, JA5 and JA8stated that their needs are met by meeting their targets. Still, it is hard. JA4 and JA6 said that their target goals are less than their sales revenues in the previous company. JA11 indicated said, "all agents do their best to achieve their goals with mostly tech leads, not marketing ones".

Agents mostly believed that they had numerous customers that want to buy their equipment from us, but they could not afford it. If this rental program is implemented, it will allow our potential customers to rent to own their HVAC products and be confident that technicians of our company can service their equipment annually by either fixing or replacing damaged equipment. Even though we could not change the price of our equipment, we could achieve a great package at a reasonable price. The recommended rental package targets the market segments of consumers who are looking for peace of mind and lack the monies for an initial investment in HVAC equipment. More importantly, considering the limitations and obstacles of the pricing strategy, we came up with a solution to smooth the negotiation process for our agent by offering a lower monthly payment and peace of mind. Considering the win-win negotiation process creates situations for both parties to find solutions for issues at hand (Liu and Sharma, 2011). We were able to provide a solution that can address the needs of an extensive domain of our potential customers and increase our agents' sales volume.

As I have explained in the previous chapter, this part of my action research reflects on the following questions: "What kind of training is required to improve negotiation skills? How does one determine the length and material of training?"

How necessary is the training of the sales agents and qualifying them with negotiation strategies? And if technical knowledge or sales knowledge alone adequate concerning selling HVAC products? Or do sales representatives have to be trained in practical negotiation approaches?

There are different books and articles about different stages of sales negotiation, and most of them have recommended almost the same procedures and stages with some minor changes. For example, Decormier (1989) introduces four stages in negotiation as the 1-Introduction 2-qualification 3-presentation 4-closing and post-closing. In the different article, John Alford Stevenson (1923) believes that most of the book has the following selling process, which is:

- Attracting attention
- Arousing interest
- Creating desire
- Establishing confidence
- Forcing action.

In general, most of the books and articles with some minor changes almost offer similar approaches in the negotiation process. They believe the following points should be covered in this procedure: Verbal and effective communication, reduction of misunderstanding, rapport building, problem-solving, and decision making.

Goldner (2007), in a book called “Power techniques that win even most challenging sell,” explains how sales representatives can win demanding customers with a systematic negotiation process. As shown in Figure 6 below, the sales process is collaborative, and sales agents should try to understand the customer's interests and make them close to their interests. According to Goldner (2007) "Consultative Sales Process" sellers and customers have some divergence at the beginning of the meeting. However, by asking several questions, sellers can understand the needs of their customers and align their interests with the interests of the customer. The customer wants to buy the products at the lowest price possible, and the seller wants to sell at the highest price. The position of sales agents would be challenging if the sales process just revolved around the price. Instead, the sales agents can recommend different alternatives to customers and suggest the best solutions to the end that the interests of both seller and customer align together, and the deal goes through. Figure 6 below shows the consultative sale process.

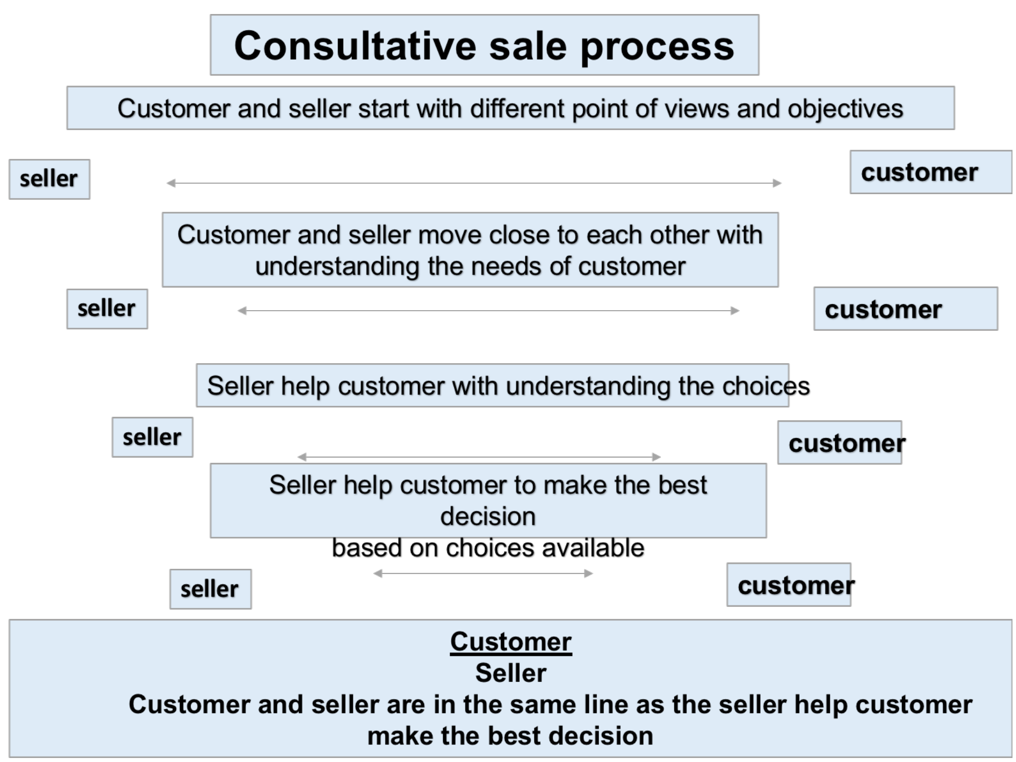

Figure 6: Consultative Sale Process

Source: Framed by author

After several hours of discussion and evaluation considering the stages of negotiation in the context of our company, all seven participants agreed that Energycare was still lacking a standard sales strategy for training the sales agents. The participants mentioned, “We have experienced a routine framework of training every year and still not adopted a systematic custom sale approach specifically for Energycare”. Then I asked this question from a participant.

11. Finding Based on RQ2(3)

Do you think Energycare has a standard sale strategy and training process? that again reflects on question two of action research” What kind of training is required to improve negotiation skills? How does one determine the length and material of training?

DM1 and DM2 believed Energycare had not adopted a fundamental sales approach and just trained agents with a sales force system to create order and implement it. SM4, SM3 and SA8 said that Energycare had not adopted a key strategy in the sales process. Their training was primarily focused on sales-force training. SM1, SM2, SM4, and DM1 suggested that the sale strategy of Energycare is not homogenous.Managers rely on agent knowledge and talent mostly. JA1, JA2 indicated that they had a few pieces of training a few years ago and that was it. Still, none of them was about negotiation and sales presentation. The participants stated that they had a couple of weeks ride along with other sales agents at the beginning and some basic information for training. JA12 indicated that training compares to other small companies is ok but of course not adequate. One of the participants noted that the sales agent had no sales training and provided them primary literature to review till further training schedules.

This is supported by the literature in which Bejinaru et al. (2016) argued that service companies have not effectively invested in long-term training for the sales representatives.

The answers of sale agents regarding “if they had adequate training in sale strategies?” proved it was not comprehensive.

12. Finding Based on RQ2(4)

“If they had adequate training in sale strategies?” this again reflects on the second question of action research.

The importance of the training includes it can help to be familiar with sales strategies and at least know what the company wants from sales agent to do. Exercise is essential but should be armful and along with the company’s strategy in the value proposition. I had no training, and I was lost for the first few months of my job. The sales agents indicated that they had two weeks of very general training, and the trainer was the motivational trainer. This job is technical, and the sales strategies should be according to the content; otherwise, training is useless. Training is essential and critical in the success of employees, particularly at the beginning of your job. The participants indicated that they had concise and shallow training at the front, and a complementary course in the following training was ok. After introducing “Salesforce” to sales agents and some basic sales training, Trainers put them in the field. There is a direct relationship between the training and success of sales agents in negotiation (Elshenway, 2010). The efficiency and closing ratios of our agents are not satisfactory. As we have explored, our agents’ skills for negotiation are not sufficient, and they primarily chase the customers. At the same time, with at least three weeks of training, Energycare can improve their performances (Elshenway, 2010).

4.6 FINDING OF CYCLE (#3A): PERFECT VISIT PRESENTATION

My findings in this section of action research provide Energycare a "Comprehensive Presentation Book" which contains vital factors that need to be presented to customers to pave the ground for value propositioning and negotiation. Educating customers and informing them about product specifications and performance is critical in sales engineering and technical presentation, especially when dealing with customers who did not have any technical background. The presented book in this section concentrates on improving the outputs of both trainer and trainee.

From one side, Energycare sales trainers can provide purposeful courses with standard style and measurable criteria (Elshenway, 2010) for sales agents. On the other hand, sales agents can get an excellent chance to unfold the different layers of HVAC products and educate customers about the most critical points that can help them make an informed decision. As we discussed, the current sales presentation of Energycare's agents is not consistent and misses the mentioned critical points necessary for a perfect sales presentation. A regulated and standard presentation package is an inseparable part of technical sales. It helps agents go through all the essential sales steps and implement all the techniques to get customer commitment. In addition, such a package allows agents to go through the negotiation process and engage customers in all the strategic points of their purchase. Researching different articles, I have decided to divide this section into three stages:

1. Introduction
2. Presentation
3. Deal closing.

It took a few weeks to finalize the contents of the recommended book with participants. However, they were all earnestly engaged in this process. Some of the agents who participated in this process believed that “they have applied the content of the book in their sale presentation and received promising results already.”

The presentation book can touch on the critical points of installation and all the crucial factors that add value to customer service jobs. We can give it to our agents and teach them how to go through all the points of this book in several iterations of training courses and make sure they are following all the steps one by one. Even though any sales agent may have their specific approach in sale presentation, the critical points of the new presentation book are comprehensive and help the agents touch the critical points of sales according to the professional company of Energycare. It makes sure all the facts are followed step by step. Every sales individual is different and might have different approaches in dealing with customers. However, they can add this book to their presentation but apply their strategies to cover all points. One participant said: “Agents can still be charming and apply their techniques in their presentation. This book leads agents to go through all the required points and, while explaining the benefits, find several reasons to ask for customer business.” Such a presentation book allows us to have some clear standards for sales presentations in place and measure the efficiencies and performance of agents according to the content of the books. We called this book the “perfect visit.” The “perfect visit” can be categorized into three parts as shown in the Figure 7 below, and the most critical one is the second part:

1. Before Perfect Visit
2. During Perfect Visit
3. Post-Perfect Visit

The presentation book only covers the essential part of “During Perfect Visit”; however, the other two steps should not be neglected. After lengthy discussions and with the help of the whole team of Energycare, including the training center, inspection, and technical departments, we were able to come up with an excellent presentation book as below. As we expected, most of the sales managers were very excited about the content and looking forward to seeing the finished copy of the presentation.

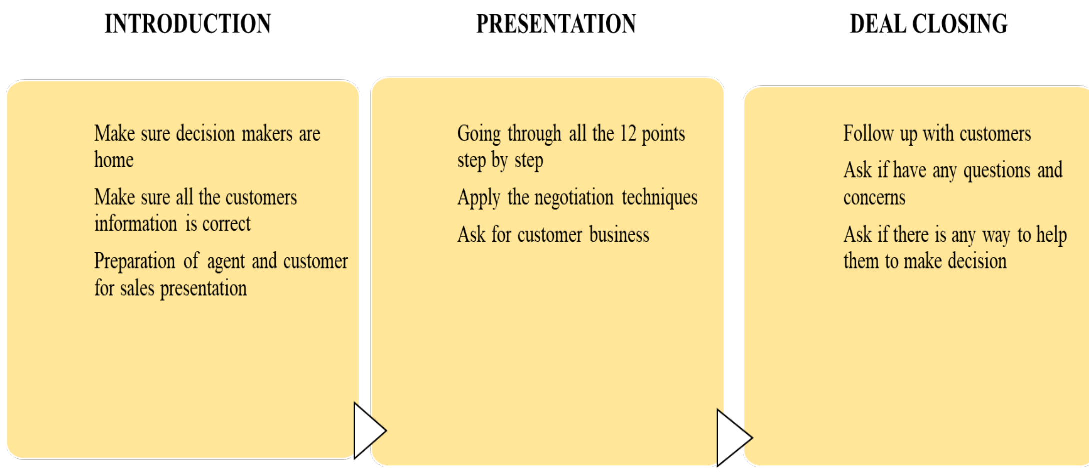

Figure 7: Steps during a Perfect Visit

Source: Framed by author

1. Pre “Perfect Visit”:

Before the customer visit, the customer service agent who books an appointment should make sure:

1. The customer understands that the length of the appointment is generally between 1-2 hours.
2. Both decision-makers, such as husband and wife, are home and try to make an appointment, preferably when both of them are home.
3. Ask if they have any pets at home. If yes, please leash them and secure them.
4. Ask if it is ok to park in the driveway? If not, where is the best place to do so?
5. Make sure to have the correct spelling of the customer's name, address, and phone numbers on file and double-check it with customers.
6. Send an email with the name and picture of the sales agent before arrival.
7. Ask customers what they are looking for and what is the purpose of the visit?
8. Ask the purpose of the visit, collect other necessary information required, and share it in the database to be seen by the sales agent before arrival. It can help agents to have a brief understanding of the job before arrival.
9. The customer's security and privacy are very important. Some customers cannot trust agents who knock and sell equipment by introducing themselves at the door. To make sure customers feel comfortable, a few sentences with the name, picture, and qualification of the sales agent should be emailed to customers as soon as the appointment is booked. Customers can see the picture of sales agents and read their qualifications before meeting them.

2. During "Perfect Visit":

This is attributed to the fact that the book incorporates primary aspects linked to the installation and the critical elements that can add value to the consumers. The sales representatives can learn the critical aspects of presenting and ensure that they implement these significant steps through the presentation book. While some of the sales representatives may have their ways of negotiating with consumers to obtain increased sales, the fundamentals of the presentation book involve assisting the sales representatives in touching on the core elements of sales in line with Energycare's objectives and goals. Energycare should have a systematic and standard sales presentation process and train the sales agents to value customers with all the critical factors explained in different parts of the "perfect visit." Unfortunately, there is a lack of a standard presentation book for the sales agents to follow the steps one by one. Such standard strategies in the negotiation process and sales presentation can help both Energycare and the company's sales agents. We noticed that a few sales agents do not even have sales presentations. "I only make sales and negotiation based on my experience; I don't have any presentation book" SA2 said. For example, SA7 said, "I have faith in the buyer," and SA6 said "I have to explain to the buyer some of my ways of the interest within the business, and they also tell me some of their priorities, thus we evaluate each other." Marketing provided a presentation book a few years ago to all team members and has not upgraded the contents and the materials. My recommended "presentation book" can help Energycare sales agents present the products in a step-by-step process and cover all the critical points imperative for a flawless sales presentation and negotiation process.

For effective promotion and distribution of various products sold by Energycare, a professional presentation book is recommended. Through the step-to-step procedures, all the elements are dealt with. The presentation book can help Energycare sales agents present the products in a step-by-step process and cover all the critical points imperative for a flawless sales presentation and negotiation process. One of the main benefits of a presentation book is that sales agents find it easy to know the prices of different products.

The 12 parts of the sales presentation book is a sale process which is illustrated in Figure 8 below:

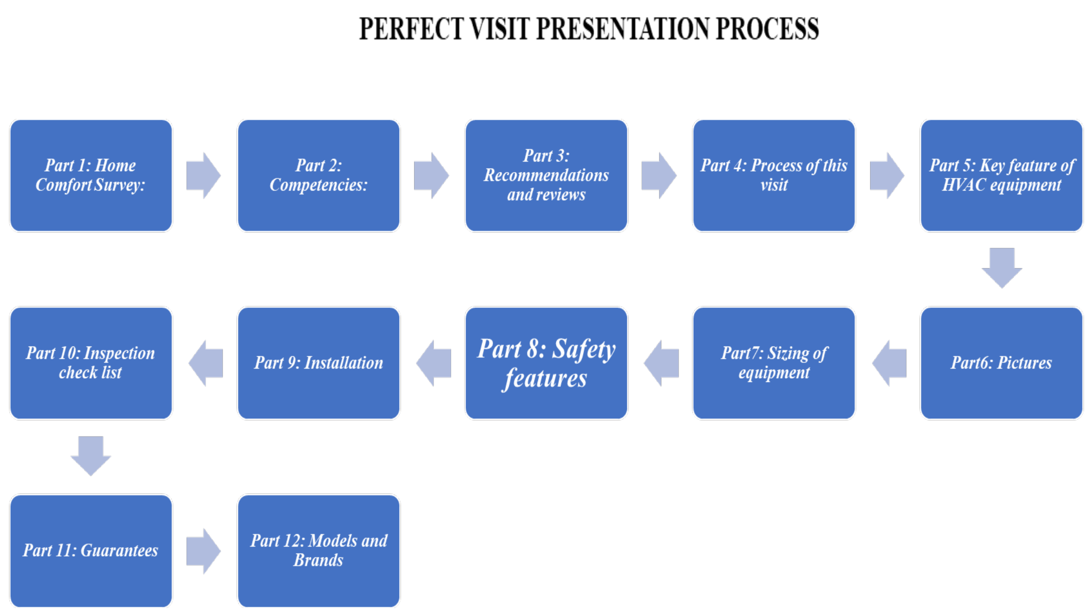

Figure 8: The 12 Steps of Recommended Presentation Book

Source: Framed by author

As we conclude with team members, the "perfect visit" presentation book can be used as the starting point of sale negotiation after greeting and initial conversation with customers. The presentation book starts with the home survey and follows as you can see below:

1. Part 1: Home Comfort Survey:

This part contains some questions that need to be asked to understand the customer's needs and requirements as follow:

- Name, address, home age, size, and safety issues.
- How old is the house? Furnace? Air conditioner?
- How long have you lived in this house? How long do you plan to stay in this house?
- Do you plan to do any renovations?
- Have you had any ongoing maintenance with your HVAC equipment?
- Are you familiar with the benefits of regular maintenance of the equipment?
- What is this house used for? Residential? Commercial? Office? Shift work?
- What is the load calculation of the house? Are you familiar with the load calculation of your house?
- Please let us know if you have any concerns about the air distribution in your house. Do you have any hot or cold spots in your house?
- Do any of the family members suffer from allergies and/or breathing problems?
- Have you done duct cleaning recently?
- Are you familiar with the new high-efficiency equipment? Models and specifications?
- Except for the price, what other factors would help you to make better decisions in purchasing HVAC equipment?
- How much do you pay for the gas/electricity bill for this property monthly?
- Are you familiar with the new high-efficiency burners?
- Are you familiar with new HVAC equipment that can impact the environment?
- Is any other family member involved in the decision-making about buying equipment?
- Are you ready to purchase new equipment if you get what you are looking for?

- When do you plan to install the new equipment?

How do you pay for larger ticket purchases? If you receive a combo promotion, you could change all of your HVAC equipment.

2. Part 2: Competencies:

The salesperson should relate a brief story about the company mission, vision, and core competencies, such as the size of the company, number of employees, number of locations in Canada, our specialties, and how long we have been in business. This part can help customers who are not familiar with us better to understand the size and competencies of our company.

3. Part 3: Recommendations and reviews

On this page of the book, we can add letters of recommendation from previous customers and maybe Google reviews of previous customers. This part can help build trust by giving the customer a chance to review our previous clients' good experiences.

4. Part 4: Process of this visit

On this page, we can explain what our time together for this visit will entail and share the steps that we will go through together. These steps include:

- Measuring the size of the property
- Checking all the components of mechanical rooms
- Sharing the information about our company and how can we help
- Performing mechanical calculations
- Finding out what is the best system for your house

5. Part 5: Key features of HVAC equipment

During this part, we will explain the following key features of the HVAC purchase:

- Technical requirements
- Code and safety requirements
- Environmental choices
- Personal choices

The sales agent can get a chance to talk about the safety and standards of installation and how important it is to deal with an ethical company like Energycare and our fully licensed technicians. They will be installing the HVAC equipment. The safety of residential HVAC equipment is critical for any homeowner. On this page, sales agents get a chance to explain the core competencies of the company which they are representing.

6. Part 6: Pictures

This part can be somewhat technical. By showing pictures, we can review the different HVAC installation procedures to the customer and explain why some of them need to be changed and how this will help to improve the efficiency of the house. We can explain how the HVAC system in residential or commercial properties is connected and how one failure in the system can affect the rest of the equipment. On this page, sales agents can get a chance to increase the total revenue of the sale and will get a chance to increase the average ticket by selling more equipment.

7. Part 7: Sizing of equipment

In this part, we can perform the “Heat Lost” calculation for the customer and explain what size of the furnace, boiler, or air conditioner is required for their property. We can go through some technical aspects of the ductwork and the engineering part of the sale presentation and explain to customers which size and model of equipment can help them to have the best home comfort and ultimate efficiency in their house. Technical justifications and engineering calculations can help sales agents convince their customers of the value and build trust. By proving to the customer what is exactly the required size of the furnaces or other HVAC equipment like BTUs and heating or cooling capacities, we can get a chance to immediately bypass the competitors who ignore this part in their sale presentation.

8. Part 8: Safety features

This page contains the safety and warranties that are included in our contracts. Some certificates and permits include:

- Fully licensed technicians with gas/electrical/boiler licenses
- Workplace Safety and Insurance Board (WSIB) insurance
- Liability insurance, which is fully insured coverage for home protection
- Electrical Safety Authority (ESA) permit
- We can include pictures of the certifications in this chapter.

9.Part 9: Installation

This part can be about installing HVAC equipment and how necessary the installation is for heating and cooling equipment. Of course, HVAC equipment is not like a refrigerator or TV set to buy and plugin; it needs to be installed by a licensed technician. It requires a professional team of technicians and inspectors to support the potential problems. We can include a picture of the perfect installation and a picture of faulty ones and show these to the customer to compare. The sales agent will explain to customers the sensitivity of new equipment and how serious it is if a customer is offered the wrong equipment or if it is not installed according to Toronto

Standards and Safety (TSSA) codes. It should be explained that the wrong installation can be problematic for them. It might lower the efficiency and lead to poor performance of the equipment. Technical features and the manufacturer's requirements need to be explained in simple language. Customers should have enough information to make the correct decision at the end of this process and understand why they should hire the right company to install their HVAC equipment.

10.Part 10: Inspection checklist

This final chapter can add the "Inspection Checklist" that our installers always go through and answer any questions. This checklist can help technicians and inspectors measure and monitor the performance of the installed equipment and measure the gas pressure as the temperature rises.

This part is the extra mile that some companies like Energycare can make sure that the installation of the equipment is flawless and according to the manufacturer's engineering charts.

Such inspections are not easy and take extensive time and effort to perform, right after each installation. This part of the installation that professional companies like Energycare regularly perform for all installations is skipped by most HVAC companies in Ontario, Canada, because of the time and technical knowledge required.

Our professional technicians continue to go through training courses by different manufacturers regularly right after introducing new HVAC equipment. New engineering designs, models, and specs of boilers and furnaces require several hours of training for any licensed installer or technician to make sure to not only install the equipment correctly but also make sure that the equipment is working at optimal efficiency with minimum service calls required in the future. Such training is not part of the Toronto Standard Safety Authority (TSSA) codes and regulations. Still, professional heating and cooling companies schedule such training to minimize faulty installation and extensive service calls. Unfortunately, it requires time and money, and not all the HVAC companies, particularly the mid and low-size corporations, can afford to do it.

In this section, sales agents can make sure that the customers understand the layers behind the installation and how a professional company like Energycare can help them have a rewarding experience in purchasing and installing their HVAC equipment.

11.Part 11: Guarantees

All the companies and manufacturers have warranties and guarantees for their products; however, customers are always worried about the terms and conditions that make the contracts limited and how it might hurt them when they need services. Therefore, we thought it might not hurt to add some “Worry-Free Guarantee” that can give customers peace of mind and which sales agents can emphasize when negotiating with customers. After some discussion with participants, we concluded that the following guarantees might be the most critical ones to offer to customers when dealing with them.

- *Temperature satisfaction Guarantee:*

We can give homeowners a guarantee that their home will remain at the same temperature they want and that if they feel cold in winter or hot in summer, we can fix their issue with no charge within a certain number of years of the equipment’s life.

- *Replacement Guarantee:*

We can ensure that their equipment can be replaced free of charge if some critical parts of the equipment break down: for example, within the first 3-7 years of installation.

- *Home and property protection Guarantee:*

Installers will respect and protect the property while installing the equipment. If any damages occur during installation, Energycare will fix the damages with no cost and compensate the customers for potential issues.

- *Green Environment Guarantee:*

We can guarantee to our customers that the old equipment will be recycled in an environmentally responsible way and that all the parts like circuit boards, refrigerant gas, and metals of old air conditioners and furnaces are recycled according to the specifications of the Heating, Refrigeration, and Air conditioning Institute of Canada (HRAI)

- *No extra cost Guarantee:*

We can ensure that we are not charging them anything extra during and after installation and that the final amount is what we agree on right now.

12. Part 12: Models

The last part of the presentation book can be the different types and models of equipment with similar engineering between different manufacturers. It can be clearly explained which type and model can best fit the customer's property. We have added some charts and tables from the HRAI and manufacturer specification sheets to show the customers how different models perform and how this can save them money in energy bills and add comfort to their homes.

3. Post "Perfect Visit":

After the perfect visit, we need to follow up with the customer and determine if the customer has any questions or concerns stemming from the presentation and if the correct information was provided. We need to find out if the customer has made any decision yet, and if not, how we can help them in their decision-making. Sometimes offering more discounts or adding some items to the contract can help customers commit to their HVAC purchase and installation. The action research team concluded that the following steps should be undertaken after the perfect visit:

- Call the customer for follow up and ask them if they have any questions or concerns
- Ask if they have decided to go ahead. At this point, try to ask more questions and see if the customers have any quotations from Energycare's competition.
- If the customer has received any different quotations from competitions, ask them if they want you to review Energycare's quote with them to compare the items and prices together.
- In this situation, it is essential to meet a customer for the second time, so if you plant the seeds during your presentation, you can go back and review the quotations. If the customer trusted the agent, they could give him/her their commitment to go ahead with the contract.
- Adding more discounts to match the price is very helpful to ask for their deal.
- Adding some extra value like free duct cleaning, free air balancing, or a new thermostat or humidifier that is not very expensive may mean a lot to the customer and sometimes work.
- Waiving some charges like administration fees and financing charges can help.
- Add a few months free rental payment; or, if they finance their products, a few months or even a year deferral payment is game-changing and helps them a lot in decision making.
- Re-emphasize to the customers about the potential problems that might come up if they go with a cheaper company, including safety, insurance, poor installation, and not honouring service contracts

- There is nothing wrong if you did your best and try all the options and the customer still decides to choose another company to do their installation. Thank the customer for giving us a chance to visit them and wish them luck and ask them to call you back if they have any questions or concerns.
- Agents are not supposed to win all the customers; it is ok to lose some of them because of competitors' lower prices and because of personal reasons that a homeowner may have, but our professional approach always remains with customers. They might call us back for their following equipment or another service. The brief features of the perfect visit are examined below in Table 6:

The given Table 6 specifies the features of a perfect visit.

Table **6: Features of a Perfect Visit**

Before perfect visit	**During perfect visit**	**Post perfect visit**
• The company call them and inform them about the appointment • Make sure they have aware of the length and purpose of the presentation • Allow customer to prepare home and dedicate 1-2 hours for presentation • Make sure all decision-makers are home • Make sure agent have all the required information and they are all correct	• Home comfort • Competencies • Recommendation and review • Process of visit • A key feature of the equipment • Pictures of equipment • Sizing of equipment • Safety features • Installation • Inspection checklists • Guarantees • Different models	• Follow up with customer • Ask if have any question or concern • Ask if have any competition quote • See if can match the quote • Add more value for last chance • Add more discount for last chance • Congratulate customers for their purchase

Source: Framed by author

Sales presentation techniques and deal closing with the customer:

Sales agents should learn the different skills and techniques of the deal closing. Numerous styles and strategies can help sales agents win their customers and ask for their business in various stages of negotiation. All of the agents need to close the deal to make a sale. In several participation meetings of action research, we had a few agents who admitted that they are not very familiar with deal closing techniques and that as soon as the customer tells them that they "want to think about an offer and will call you back," they do not continue and leave the meeting. Deal closing techniques help our sales engineers try different strategies to get deeply involved in the customer's requirements, create a sense of urgency, and commit to the first meeting. This section is explained in detail in the next section.

4.6.1 Summary of Findings (Cycle #3A)

I believe that creating information with meaningful content for the firm's success was imperative to the company's success. However, it was evident that the employees who could not increase their sales were likely to be laid off since the company was focused on growing sales and gaining a competitive edge within consumer markets. During the action research process, I realized the critical potentials of polarizing the evaluation mechanisms to incorporate them into the already existing dichotomies already present within the firm's negotiation mechanisms. This is linked to the work of Anghelus and Boncu (2011). According to scholars, negotiating parties are highly focused on control and power, as well as competition. The negotiation process utilized by the sales agents is implemented based on whether the parties are likely to develop a future relationship. On the other hand, I noticed profound disharmony across and within the marketing and sales departments of the company. This is evident in the work of Ribeiro (2011), who argued that about 80 percent of sales agents lack significant performances because they lack fundamental negotiation approaches. As such, the limitations of Energycare are associated with the various mechanisms utilized in increasing sales. Accordingly, limited coordination between the executives and the sales agents concerning the critical negotiation frameworks utilized has been observed. Also, significant misalignments were evident between the theoretical expectations and practical implications. This further impacted the link between the company's objectives and values and the personnel's missions enacted on the ground.

Furthermore, as noted in the literature, the stages of negotiation include an introduction, qualification, presentation, closing, and post-closing (Decormier, 1989). This is further reflected in this section of the analysis. The outcomes of the study and how it examines the limitations of the firm’s negotiation strategy are essential. Based on this context, I noticed that various elements of the research caused significant discomfort for the staff involved because the action research posed key queries that covered the company's entire operation. The process also involved listening and engaging the entire team of Energycare. In addition, during the research process, it was observed that the groups were encouraged and inspired to implement their strategic plans. In this manner, all the staff, from the top to the bottom of the hierarchy, were accommodated and encouraged. While the mechanisms seemed beneficial and critical in the action research, they threatened the regular operations of the firm. The excitement by the executives earlier was observed to diminish with time. The presentation book enabled an excellent guide for the sales presentation. Also, sales agents’ performance and efficiencies were examined based on the book’s content. The book illustrated the perfect visit, which was categorized into sections before an ideal visit, during the perfect visit, and after the perfect visit. The presentation book further provided vital elements of the deal closing. It allowed the sales agents to try various strategies towards meeting consumer needs and creating a sense of urgency and commitment.

4.7 FINDING OF CYCLE (#3B): VALUE PROPOSITIONING

In this part of my action research, I address the following essential questions:

- Why do sales representatives have to emphasize creating value compared to price?
- How does the process of adding value assist in the process of negotiation?

High performers achieve better results provided that they apply the right strategies (D’Andrea, 2005) and ask for more in negotiation. Participants reflected on the question of

13. Finding Based on RQ5(4)

"Why should Energycare sales agents add value?" which again reflect on question five of action research, "why do sales agents need to focus on value creation versus price?"

Regarding why agents should create value, SA6, SA7, SA8, SA9, and SA10 indicated that if the value is not added, the company cannot sell its products. SA4 suggested that there is a need to add value to justify the higher prices. SA8 indicated that value proposition is part of the presentation and sales strategies and we need it all the time to justify the high prices of the company. SA1 and SA2 indicated that agents could create value to increase profit and make it a win-win for Energycare and customers. SA11 and SA12 both indicated that agents creating value is necessary. Still, it should fit the competencies of the company otherwise is not very effective. SA5 showed that agents creating value is an insuperable strategy of sales. To be successful, we have to add value to our sales products and make sure they are unique and useful for customers.

This introduced six fundamental strategies that are recommended to be applied in the training of sales agents. As D'Andrea (2005) argues, to achieve more, sales agents need to ask for more; and besides that, they should add value first and then ask for higher prices. Goldner (2007) believes in his arguments that all customers have a fixed budget in their minds. When sales agents add value to products during the sales process, it helps the customer's budget grow and makes the business more profitable. Below Figure 9 specifies that adding value in sales modifies the customer budget.

Figure 9: Customer Budget Growth with Adding Value

Source: Framed by author

Participants mostly agreed that Energycare's value propositioning is not influential. However, considering the potential and competencies of the company, we can do much better and implement the right strategies to improve our closing ratios.

14. Finding Based on RQ5(5) &RQ7

"How does adding value help agents in the sales presentation?" This question reflects again in the fifth question and also the seventh question of action research" How important is it that parties of negotiation trust each other."

All sales agents agreed that customers should trust agents; otherwise, "never buy from us." Value-adding should be step by step in the sales presentation process. For example, JA1, JA2, and JA3 indicated that an excellent presentation could help decision-makers to finalize the deal on the spot and make the decision on their purchase fast. JA11 and JA12 stated that it is imperative to add value in the sales presentation; otherwise, everyone can sell their products by phone. In addition, they added that it is the whole purpose of sale presentation, but we need to offer valuable and unique products that others cannot compete with. JA7, JA8, JA9, and JA10 suggested that it should be according to the competencies of the company, otherwise cannot be practical. Finally, JA6 said, “it is critical to win customer trust and ask for a commitment to purchase on the kitchen table of their house”.

Energycare can implement fundamental strategies in training to make sure that agents understand the importance of value propositioning. Our agents should know the principle of “high-value high price” D’Andrea (2005) and build value in negotiation when dealing with customers. In our action research, we tried to offer some practical solutions to address this point and help our agents in this process. Energycare sales prices are high but have higher operational costs as well. To be profitable, our agents should add value and keep the margin of profits healthy enough. Our agents should first believe in value propositioning to be able to offer it in their negotiations. We tried to develop some practical solutions with our participants to offer some products and services to help Energycare in its value proposition. Even though Energycare’s strategies in increasing the perceived value are noticeable, we tried to develop a few valuable and unique products that other competitors can rarely present.

In the last decade, we have witnessed that the Internet has stimulated the emergence of a new market, which of course tends to reflect% the increased growth of new products and technologies. Such a market creates enormous challenges for e-commerce and agent-based services (Amor et al., 2004). Such challenges are true for engineering and technical service companies, as customers' expectations are high now. They prefer to control the indoor temperature of their house easily via smartphones and monitor the situation in their hands. Customer awareness and value propositioning are some facts that cannot be overlooked in the sales presentation. Considering the capabilities and competencies of the organization, any corporation can come up with some strategies to add value to its line of business. One of the most exciting products that caused participants to spend some time designing is an intelligent thermostat that can be easily integrated into the Energycare line of business. Such a high-tech thermostat, with fewer features, is already available in our company. Adding some minor changes to this thermostat by adapting some technologies will make it a great product that can help in building more value in our negotiation.

As I explained in the literature review, Tjan (2009) has an organization's value propositioning divided into four categories: Best Quality, Luxury, Must Have, and Best Bang for The Buck. Energycare always introduces itself as the "best quality" HVAC company in Canada and tries to offer the best value for its price.

Of course, our top-notch quality of installation and the best Q&A inspection checklists, which were explained in detail, are some of the indicators of Energycare being one of the most professional companies in the Canadian industry. However, we need to make sure our value proposition is not limited to just installation and services. Most of our customers try to check with a minimum of three different providers and get three quotations before making any decision. Energycare wants its offer to be accepted and for the customer to choose value over price. Many times, agents cannot find any extra value to offer and make the deal unique to the customer (Tjan, 2014). Some customers believe that we are all selling the same equipment and that all of them have the same manufacturer's warranty and so wonder why our price is much higher than other competitors. To answer such a question, we tried to develop some unique value propositioning to help our sales agents not chase the customers and provide an excellent solution for their potential inquiries.

4.7.1 Offer Customers the Smart Choice

We can offer our customers bundle packages that can help them solve their issues and intelligently. Hammonds (2000) believes that people have different expectations and that almost all customers want products according to their own choices and preferences. Successful companies know how to deliver them and how to deal with the customer's presentations. Our equipment packages should be comprehensive and contain all of the required components for a complete installation. Kwun and Oh, (2004) argue that it is not always easy to manage the choices for the customer as they love the choices but cannot handle many choices at the same time. Preparing two or three ready-to-install packages that allow them to efficiently and intelligently choose their products is the best option for companies like Energycare.

4.7.2 Timing and Fast Response is the Best

In this dynamic living environment, people want everything fast (Hammonds, 2000). Quick responses to demands and service calls, especially on very cold or hot days of the year are a great value proposition that can be applied by most service companies. Customers are ready to pay premium prices for their furnace to be installed the next day on a frigid night. Service companies like Energycare should have the equipment and installation crews always available to install and service. This allows them to react quickly on rush service calls before the other competitors and take care of a wide range of customers in extremely hot or cold weather.

4.7.3 Calculate the Importance of Each Point

It is vital to understand if it was worth spending extensive time on some points that are not very important. Some negotiators take some points personally and start lengthy discussions with customers that engender frustration. Rothman and Northcraft (2015) argued that it is vital to calculate each point to identify its significance.

4.7.4 Consider the Value Propositioning from Customers Point of View

Different parties may have different points of interest. It is not necessarily the case that all individuals have the same priorities. What is essential for customers at specific times might be different from ours. Agents should be able to understand this and build their values accordingly.

4.7.5 Look at Value Propositioning from the Customer's Point of View

Sales agents must understand what is very important for the customer when it comes to the value proposition. Different individuals might have other concepts of value. Professional negotiators need to keep the balance in all sections and essential points of negotiation. Sales agents need to know where their "currency is worth more" (Tjan, 2014) and the most valuable point that can be critical at that juncture. It could be the timing of the installation & service, equipment, expertise, price, purifications, humidification, or many other variables. It is not difficult for the sales agent, by asking several questions, to find out the customer's priorities and let the deal close. Such a professional approach can benefit agents. Tjan (2009) believes that agents should think in a bigger context while negotiating and show rationality and empathy and put themselves in the customer's shoes in this process.

4.7.6 Custom Thermostat & Monitoring System

Energycare, like other organizations, is experiencing a highly dynamic market and needs to foster new technologies in the business model to address the demands of the new generation of customers. Energycare can help sales agents to create more value for customers by embracing innovation and creativity (Morales, 2011).

D'Andrea (2005) argues that high-performing sales agents improve the expectations of their customers with value creation and by recommending innovative products. After deep reflection, we decided to create something unique but practical that can be quickly adopted in the Energycare service line. In discussion with team members, we noticed that we cannot compete with the prices of other companies and that if we want to have a price war with competitors, we do not have a good chance and will probably lose. Our installation cost and overhead are more than small companies, and we definitely cannot compete with them. However, as indicated by Energycare (2019), Energycare has competencies and capabilities that customers need to be familiar with and find out what we can do for them that other competitors might not be able to offer.

Wi-Fi thermostats are very popular nowadays. Like NEST, which Google makes, some of the most popular ones have some exciting features, including temperature management on smartphones and analytical data that allows customers to check their home energy history (Energycare, 2019). Some of our competitors add this expensive thermostat to their products to target tech-savvy customers. Energycare recently joined in with a high-tech security company named Quick Contractor and is offering a kind of home security service that can be installed in customers' houses to monitor their property through Wi-Fi devices such as smartphones and computers (Energycare, 2019). Energycare invested a lot of capital into this recently introduced system. However, the finished product being offered to customers through Quick Contractors and our HVAC department still has not benefited from this newly introduced thermostat as a value proposition.

After some discussions reflecting on the question "How can technology help improve value?" we noticed that the HVAC department of Energycare could join quickly with Quick Contractors and add the monitoring system to our HVAC equipment. If such a merge happens, it can allow our sales agents to offer this thermostat to HVAC customers. Energycare can benefit from this strategy in both values propositioning for HVAC equipment, which can improve the sales ratio, and on the other hand, introduce the monitoring system to a broader range of customers.

Some peers in action research believed that Energycare needs to refresh its brand by introducing new technologies and “Cool” services (Energycare, 2019). We concluded that the merge of the security system with the Energycare HVAC line could attract some customers from the younger generation and more tech-savvy customers and might help to dust off the traditional brand of Energycare.

By installing this system, customers have an outstanding experience controlling the temperature and monitoring their house in one device. As I have explained before, this technology is already available from Energycare but is not offered with an HVAC installation. Installation of such a device also allows our system to monitor the temperature of the customer's house. In case of any temperature fluctuation due to heating or cooling malfunctioning, our technicians and customer can both be notified posthaste. This technology in the cold temperature of Canada is an excellent value for our products since it can allow our technicians to diagnose the problem as soon as it occurs. Before the home loses its heat, our service department is notified.

In several meetings with Quick Contractors and the IT department, we found out that this merger can happen quickly if the legal team approves it. This merger can occur rapidly, and HVAC sale agents can add this great device to the equipment they offer. Interestingly, after several meetings of action research and inviting decision-makers of Quick Contractors, IT, and HVAC departments, they all agreed to the benefits of our recommendation and promised to share the information with higher managers for approval. Since this system is already available through Quick Contractors of Energycare, we hope that we will add this helpful device to our HVAC value propositioning soon after managerial support.

Here are some exciting features of the recommended thermostat:

1. Monitoring temperature:

We are monitoring the temperature of our customer's houses on our computer. If the temperature drops rapidly, the system can send the customer an email and inform them about the potential issues. We can book a service call for customers within the shortest time possible to fix the problem before any discomfort.

2. Monitor water leak:

The other good feature that can quickly be adopted through this thermostat is to install a water leak detector in the boiler/furnace room and, in case of any leakage, the system informs the customers. In Ontario, we have a lot of damage in the basements of properties caused by the failure of HVAC equipment, which poses potential harm to living areas. Most HVAC equipment like furnaces, tankless water heaters, air conditioners condense water during normal operations, and reducing water should be adequately drained and regularly maintained and monitored.

Most of the homeowners, as participants believed, are worried about water damage and the leaking of equipment in their basement, precisely when they are not home for either work or vacation and have to leave the heaters on to make sure their home is not freezing in the frigid cold temperature of Canadian winter. In this case, one of the advantages of the high-Tech thermostat is that it can:

3. Shut off the main water of the house in an emergency with a smartphone:

After any water leak detection, the customer can shut off the main water valve on his/her phone and stop the property's water flow from a distance. This feature allows customers who are not home to have peace of mind and, in any urgent situation, shut the water off and stop the water leak. Of course, we would need to install an electronic water valve that can be energized electronically and controlled by an app on a smartphone. Such technology has been on the market for a while and needs some modifications to our thermostat.

4. Video monitoring of property:

Another ready-to-adopt technology is the video recording and lives to the stream of cameras installed inside and outside the house. It can easily allow the customer to watch the inside and outside of his/her property on his/her smartphone anywhere and anytime. It can also enable the customer to record up to 3-5 thousand hours if the motion detector is activated and someone moves in front of the cameras.

5. Doorbell video and communication:

Doorbells that allow homeowners to talk with someone behind the door through their smartphone are very popular right now; we can easily modify such technology to be included with our thermostat. As soon as someone rings a bell, the customer can see them by monitoring their phone, talking to them, and even opening the door if they want to.

6. Open the door:

Door locks that can be energized electronically and lock and unlock the doors are prevalent. By adopting the technology, that device can be installed on customer houses and operate in a customer's hands in a smartphone.

7. Smoke detector:

Smoke detectors are very critical in homes, and they can save lives in case of fire and carbon monoxide leakage. Unfortunately, we have had numerous accidents that cause death and injuries because of airflow furnaces. When the furnace heat exchanger cracks, it produces carbon monoxide, and it easily leaks to ductwork and inside the house. Smoke detector installation is mandatory in Canadian dwellings, but it is the homeowner's responsibility to make sure the battery is charged and safely operating. Our smoke detectors can be monitored easily through customer smartphones and in case of any emergency, like carbon monoxide detection or smoke in the house or even when the batteries need to be replaced. If for any reason, they fail to operate, the customers would be notified right away.

This device needs a hub and works with cellular data. It is another advantage of this device that it does not require the internet. It is a significant feature that builds value for the customers who are not home most of the time and can monitor and operate their HVAC and home appliances from their phones anywhere and anytime. The application of such a device cannot be limited to the above features, and we can add different applications to this device and enhance the system as soon as Energycare decides to embrace new technology. The recommended part of this thermostat is listed in Figure 10 below. Figure 10 highlights the components of the Energycare smart thermostat with monitoring.

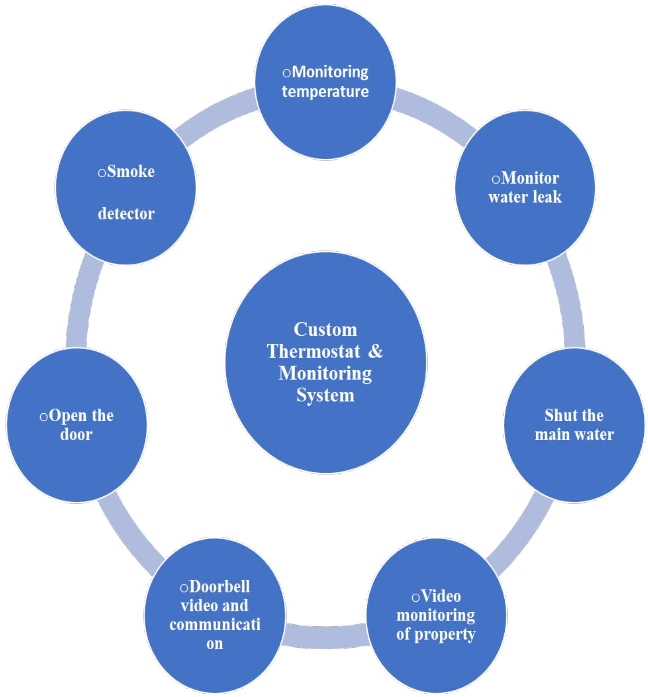

Figure 10: The Features of Energycare Smart Thermostat with Monitoring

Source: Framed by author

4.7.7 Heat Loss & Cool Gain Calculation

Sales agents can distinguish themselves from other sales agents by going the extra mile and doing something more than other competition representatives. One of the significant issues that can be found in the HVAC industry and some other service companies is not calculating the house's heat loss and therefore installing the wrong size equipment for furnaces. Such a bad habit can cause several issues in operation and cause heating and cooling equipment not to maintain the ideal temperature in the house and cause a great deal of fluctuation in temperature (Hosni et al., 1999). Both the oversizing and under-sizing of equipment are wrong. Oversized furnaces short cycle and cause a home's temperature not to be steady and fluctuate a lot. They also cause rapid failure in the blower motor and crack the exchangers of the equipment (Hosni et al., 1999). Undersized furnaces might not warm the house properly and keep running to increase the thermostat's temperature (Hosni et al., 1999) (HRAI, 2019). This problem can be solved by doing a simple heat loss calculation and finding out how many British thermal units (BTU) are needed to warm and cool the house. Goldner (2007) argues that both customers and sellers should collaborate, and like many other partnerships, both parties should try to better both. Sales agents need to acknowledge that customers bring value to the partnership (Goldner, 2007). Sales professionals, if they do not understand how to use their expertise for value propositioning and the recommendation of the right size equipment, their knowledge and skills are for naught. (Goldner, 2007). Sales agents can be trained to do such calculations before starting their presentation and show homeowners the results. Again, such tools and professionalism can help customers trust the sales agents, and sales agents can cement the foundation of negotiation with customers.

4.7.8 Summary of Findings (Cycle #3B)

This section answered the question, "How does adding value help sales agents in the process of negotiation? And why it is important?"

The high price of equipment in Energycare should be justified by a good value propositioning strategy. The sales agents of Energycare should not expect customers to accept their prices without providing them with enough reasons why "they should buy the same equipment from Energycare?" when they can buy it from the competition, possibly with lower prices.

It is explained that sales agents can increase customer expectations with value propositioning and inform them about all the potential issues that they might confront if they deal with low-quality equipment and lower-tier companies. The principle of "High value High price" of D'Andrea (2005) was described, and it was explained that Energycare sales agents should learn the importance of such value propositioning in training. Customer awareness and value propositioning were identified in the sales presentation, and some “unique” values that competitors rarely can offer were recommended in this cycle of action research. The followings are the recommended strategies:

- Offering several choices to customers and making sure they have different options.
- Quickly responding to customer demand
- Ignoring the trivial points
- Considering and looking at the value propositioning from a customer point of view
- Offering the custom smart thermostat and temperature monitoring
- Heat loss and cool gain calculation

4.8 FINDING OF CYCLE (#3C): SELL COMPANY NOT PRICE

4.8.1 Rental versus Purchase and Financing

In this section, I tried to answer the following questions of my action research. How can the company support the sales agents in the sales presentation and negotiation process?”

I tried to elaborate the idea by asking the following questions: How can the firm support the sales representatives within the process of negotiation and presentation? And, how can the various organizational layers be of great help to the sales representatives?

Value-driven corporations have agents with much better sales skills than ones that are not value-driven (Muller et al., 2012). The reason is apparent; they invest in more ineffective and purposeful training. In addition, value creation can increase the motivation of sales agents (Morales, 2011). In several interviews and action research meetings, several sales agents claimed, "if I believe in products and added value to customers, I have much better performance."

Participants also had similar reactions to the question of "How can the firm support the sales representatives within the process of negotiation and presentation?"

Sales agents of Energycare can improve their motivation if the company helps them in value creation. For example, Energycare can create plans that prioritize customer requirements and allow sales agents to maneuver on a higher list price. I have noticed that most of Energycare's agents add value to products while the deal is on the table or during the core selling activities. In contrast, the best time for value propositioning is during the sales negotiation process (Muller et al., 2012). In this process, sales agents can find a few opportunities to escape the "price trap" and strengthen the relationship and trust with the customer while meeting their requirements (Muller et al., 2012).

Considering the higher list price of Energycare compared to competitors, if we want to increase the bargaining power of our sales agents, we should focus more on driving values (Goldner, 2007). Such value creation during the sales process or sales presentation can allow our sales agents to plant several seeds and familiarize the customer with the advantages of our products and services. The more sales move forward by adding value, the more the customer is persuaded to buy. Preparing some affordable but efficient packages that satisfy the needs of both customers and Energycare was our primary objective in this cycle of action research. From one side, we tried to provide our customers with high-quality equipment with the most professional installation. On the other side, we tried to make sure that Energycare benefitted from higher sales volumes and more profits in the long term. Therefore, I asked participants, "How can the various organizational layers be of great help to the sales representatives?" The participants' answers were interesting as most of them believed that Energycare's different departments should develop some equipment packages with more affordable payment plans. In asking the question of:

15. Finding Based on RQ6(3)

How Energycare can help negotiate agents? which reflects again on the sixth question of action research “How can the company support the sales agents in the sales presentation and negotiation process?

SA1, SA2, JA9 indicated that the Financing Department has to offer lower interest rates and a more extended period of payments for customers who cannot afford to pay in a lump-sum in advance. JA6 and SA9 believed in better customer service and proper communication of all units. SA10, SA11, and SA12 suggested that the company could minimize the politics and lengthy process of some paperwork like installation finalization. SA1 suggested that the organization has a better approach, affordable monthly payments, and introducing great equipment packages. SA4, SM2, SM3, SM1 and SA6 gave their response to be professional install, excellent maintenance, licensed technicians, and reliable equipment. They suggested it offered a valuable product with less high prices. SA7 suggested that the company should facilitate the rebates and provide affordable costs for customers with urgency and special needs.

My recommendation for the findings of this action research cycle is “HVAC-Rental Equipment,” which creates value during the sales process and, more importantly, helps Energycare’s sales agents to escape the price war with competitors. In addition, deferral payment is a new choice in the recent market that affects customer decision-making (Kemper and Deufel, 2018). Therefore, our recommendation in this section directly impacts Energycare’s sales revenues and targets a broader range of customers with even better affordability (Kemper and Deufel, 2018).

In similar research, Miao et al. (2016) argued that if customers of electric vehicles were aware of the cost of maintenance, their risk analysis would not allow them to buy their cars, and most probably, they would lease. Therefore, the cost of care, which is a significant value in this proposal, would be included in my higher BTU HVAC equipment rental solution. Fortunately, the Energycare financing line is already active, and Energycare provides short- and long-term financing contracts to its customers (Energycare, 2019). Therefore, implementing rental HVAC equipment should not be very challenging.

According to the literature, Energycare is a large company in Canada and has a great deal of potential to adopt new technologies and implement them in operation (Energycare, 2019). Such potential can allow us to provide optimal comfort for customers. However, installing new high-efficiency HVAC equipment, maintaining and servicing them, and using high-tech technologies to monitor and control them can increase the cost of products to the point that some customers might not afford it. The high-ticket price of our installed equipment curbs our competition potential and in most of the opportunities lead to losing prospective customers because of the cost.

In most of the interviews and meetings with participants, almost all of them mentioned the higher equipment prices than the competition. Our sales agents came with several stories that "some customers were interested in buying their equipment from Energycare but unfortunately purchased it with lower price from our competition." Unfortunately, such high prices do not allow our sales agents to win the price-sensitive customers, and most of the time we cannot even negotiate with such customers.

After a lengthy discussion and working on the cost of materials, we came to a practical solution that helps customers purchase and maintain their products with an easy, comfortable monthly payment without any initial lump sum payment. Such a great idea was matured after a few weeks of discussions with participants, finance, accounting peers, and the general manager of the Ontario office. We noticed that we could even “rent” the HVAC equipment to our customers and include the cost of products, installation, and maintenance in one easy payment and add it to their energy bill every month. Energycare has had experience with rental water heaters for an extended period. Most of the homeowners in Ontario are renting their water heaters from some local providers (HRAI). Rental water heaters, which are in the range of 10-40 dollars per month, are affordable for homeowners. However, because of the higher monthly payment of higher BTU of HVAC equipment, Energycare has not considered the rental of such equipment seriously. Considering the literature, the rental options of some less expensive equipment have been available (Ribeiro, 2011). However, it is much different from the structure of my recommendation in this cycle of action research.

Regular household families might not afford to pay a few thousand dollars upfront to change their HVAC equipment; however, they can easily afford to pay less than 100$ a month to rent or rent to own the equipment. To finance the equipment and pay monthly is regularly practiced in most companies, including ours. However, high interest rates and buying separate protection plans and warranties increase the monthly payment and negatively affect customer credit. In addition, they have to be approved for financing by a credit check. Our new rental program is much easier for the customer to be approved since it does not require a credit check. The legal terms and conditions of the new rental agreement, approved by consultants of the Energycare legal team, allow the company to apply action if the customer fails to pay. Such measured conditions allow our financing approval team to give agents the go-ahead for installation without any credit check. Numerous customers are not interested in being credit checked and automatically pass the option. Our rental option can keep this type of customer and target the ones with medium and lower incomes.

Besides these details, our "HVAC- Rental Equipment" can have the following benefits that cannot be found in financing them:

- Protection plans, warranties, and guarantees are all included, and customers should not pay anything extra for maintenance.
- We can approve the customer without a credit check, and payment can be added to their energy bill.
- Lien-free. When customers get the loan and finance the equipment, financial companies put a lien on the property as security. However, we can skip this part in rental equipment.
- Still, they would be eligible for the rebate, and without any initial payment, they are eligible to take advantage of the Ontario government rebate up to 4000$. (Energy-saving Rebate program-Canada.ca)
- We can also offer them a few months of free payment, like 3-12 months. It can help customers who need a cooling period to come up with monthly payments. Such deferral payments can help them to pay after installation and, in the meantime, collect the government rebates (which normally arrive in a couple of months).
- We can increase the ticket price and rent them the whole system, including furnace, air conditioner, humidifiers, and air purifiers. Customers can easily afford to pay a couple of hundred dollars for total HVAC equipment, but they cannot pay almost 10K$ for the same equipment in front.

- The rental program is "Rent-To-Own" and can be purchased when the customer changes his/her mind and wants to buy it out. Of course, the equipment cannot be taken back after installation; it should be either rented or bought out.
- The customer has peace of mind, and they are not to worry about any potential problems and issues and service calls. The company accepts all the responsibilities and will even do free maintenance annually.
- Smart thermostats and monitoring fees can be added to the monthly rental payment.
- Sales agents do not talk about the price and just introduce the low monthly payment to the customer.
- The customers with a protection plan and warranty with our company and are paying a monthly payment do not need to pay for the protection plan anymore if they decide to sign the rental contract and obtain new equipment.

Riesterer et al. (2020) introduce some techniques that help in the value propositioning of HVAC rental equipment. These techniques include:

1. **Change customer Status Quo**

The sales process does typically not end with either you or your competitor. Studies have shown that about 60% of Energycare customers are lost as "No Decision" because of status quo bias. Sales agents can change their customer status quo by persuading them that their equipment is not safe and needs to make an urgent decision.

2. **Make the familiar with unconsidered demands**

Riesterer et al. (2020) argue that most of the time, sales agents deliver what the customer demands and sell only the commodities that all the other competitors can sell as well. This does not differentiate us from others. The customer keeps receiving the same options and same packages from various competitors and remains indecisive. Our rental package can introduce something new to the customer that eliminates the initial investment and monthly maintenance fees. The rental prices for HVAC equipment would be almost double to triple maintenance fees and cover the cost of repairs and maintenance for 15 years. Considering the energy efficiency of new equipment, which is 20-40 percent, the new rental fee would be almost the same amount that the customer pays for the protection plan and extra cost of operation for an old furnace. When the sales agent discloses the benefits of HVAC rental of new equipment, indecisive customers can take advantage of the plan and, without any initial investment, install a new heating or cooling system in their house. When sales agents engage in value propositioning to customers, they should consider that almost 70 percent of their offer overlaps with the ones that other competitors offer. Therefore, Energycare agents should primarily concentrate on HVAC rental offers and create some value within the negotiation process. Plant some seeds in presentations and introduce the rental offer in any opportunity of expression. Riesterer et al. (2020) argues that the "Unique" value should be 1- exclusive, 2- essential to the customer, and 3- defensible, for example, to be proved to the customer that such solution is used to overcome the challenges of other customers. The rental of HVAC equipment is a great value that can cover all the mentioned requirements and help our agents not fall into a price war with other competitors.

4.8.2 Summary of Findings (Cycle #3C)

In this action research cycle, I have explained that the different layers of the corporation can help sales agents provide some packages to customers who have low monthly payments to escape the "price trap" at the end of the presentation.

As we discussed in this cycle, the higher prices are always blamed for the lower performance of sales agents in Energycare. It was a predominant excuse for managers to justify the loss of customers. Upon reflection of this issue, I have employed the existing plan of "Rental Water Heater" of Energycare. With the help of several divisions of Energycare and the engagement of participants, I developed a similar program for "Rental HVAC Equipment." The recommended plan allows sales agents to provide the HVAC equipment with lower monthly payments and promise customers peace of mind, home comfort, and ideal temperature for at least 15 years. In addition, the benefit of deferral payments (Kemper and Deufel, 2018) and the embedded cost of maintenance and repairs (Miao et al., 2016) benefit rental HVAC equipment. The existing rental plans of some products and water heaters allow Energycare to embrace our recommended rental offer smoothly and integrate it into their line of operation. Fortunately, the Energycare financial competency allows rental plans with a lower monthly payment and an extended period to be implemented. By offering such programs, sales agents can distinguish Energycare from lower and mid-size competitions. It is accurate, and it might not be accessible at the beginning for sales agents to offer rental HVAC equipment to traditional customers who have always paid for their equipment in advance and owned their equipment. However, the high initial investment and higher cost of repairs and maintenance of new high-efficiency furnaces make them think twice and consider the benefits of rental HVAC plans. Energycare sales agents, to be successful, should change the status quo of their customers (Riesterer et al., 2020) and make prospects familiar with the benefits of rental equipment. Such approaches can help both sales agents and customers. It can help the sales agent, on one side, to escape the "price war" at the end of the presentation and assist customers, on the other hand, to install the equipment in their homes without any initial investment and worry about the cost of repairs.

4.9 CHAPTER CONCLUSION

This chapter explores findings from action research grouped in different phases. As explored in the chapter, the first action research cycle is the result of the systematic presentation negotiation techniques. In this cycle, perfect visit presentation is addressed as an issue of concern with regards to the success of the company. Within this action research cycle, sales growth is obtained as a competitive edge for service firms. Therefore, sales representatives utilize negotiation techniques for controlling, dominating, and competition purposes. However, the negotiation is based on the relationship between the parties involved. Energycare Company does not portray negotiation techniques concerning their sales agents. This is because there is profound disharmony across and within the marketing and sales department of the company. Also, there is limited coordination between the executives and the sales agents. The little coordination indicates the low impact that is expected from theoretical and practical implications. Besides, there is a low impact on the company's objectives and values and the personnel's missions enacted on the ground. The stages of negotiation are still explored in the action research cycle. They include an introduction, qualification, presentation, closing, and post-closing. The stages are addressed from the fact that the study's outcome and how it examines the limitations of the firm's negotiation strategy are essential. Based on this context, I noticed that various elements of the research caused significant discomfort for the staff involved because the action research posed key queries that covered the company's entire operation. The process also involved listening and engaging the whole team of Energycare. In addition, during the research process, it was observed that the groups were encouraged and inspired to implement their strategic plans. In this manner, all the staff was accommodated and motivated from the top to the hierarchy. While the mechanisms seemed beneficial and critical in the action research, they threatened the regular operations of the firm. The excitement by the executives earlier was observed to diminish with time. The presentation book enabled an excellent guide for the sales presentation. Also, sales agents' performance and efficiencies were examined based on the book's content. The book illustrated the "perfect visit", categorized into sections before an ideal visit, during the perfect visit, and after the excellent visit. The presentation book further provided vital elements of the deal closing. It allowed the sales agents to try various strategies towards meeting consumer needs and creating a sense of urgency and commitment.

The second action research cycle addressed the findings of value propositioning in Energycare. This is an aspect that affects the high pricing of equipment portrayed in the firm. Under this action research cycle, it is observed that the company should embrace value propositioning since it is an effective approach that wins customers' decisions. It is explained that sales agents can increase customer expectations with value propositioning and inform them about all the potential issues they might confront if they deal with low-quality equipment and lower-tier companies. The principle of "High-value High price" needs to be embraced by Energycare sales agents. This is because the company was observed the company needs to develop strategies that will help them dominate in the service market. Besides, this cycle suggested multiple values that Energycare competitors rarely offer. The values indicated, ranging from providing several choices to customers and ensuring they have different options for heat loss and cool gain calculation (tool to measure the size of heating and cooling equipment) were observed as effective regarding the subject study.

The last action research cycle was about marketing the brand. In the cycle, different layers of the corporation are observed as effective since it can help sales agents to provide packages to a customer who has low income to escape the "price trap" at the end of the presentation. As discussed in the cycle, the higher prices are always blamed for the lower performance of sales agents in Energycare. In this cycle, programs such as “Rental HVAC Equipment” are obtained to be beneficial to sales agents. This is because, through the program, sales agents can distinguish Energycare from lower and mid-size competitors. It is accurate, and it might not be accessible at the beginning for sales agents to offer rental HVAC equipment to traditional customers who have always paid for their equipment in advance and owned their equipment. However, the high initial investment and higher cost of repairs and maintenance of new high-efficiency furnaces make them think twice and consider the benefits of rental HVAC plans.

CHAPTER 5: FINDINGS OF NEGOTIATION TACTICS

5.1 INTRODUCTION

This chapter begins by addressing sales strategies that are relevant in addressing the formulated research questions. To be more specific and differentiate the findings of my research, I divided my findings into two chapters of 4 and 5 to distinguish the contents more specifically. Sales strategies vital in addressing Energycare issues entail negotiation techniques to improve sales, hiring sales agents with technical experience, training, and coaching. Psychological traits that make a great agent are also a significant aspect that increases sales. Psychological traits include building empathy, listening and being inquisitive, and focusing on a different perspective. The chapter also seeks to review the negotiation system that is effective concerning Energycare's weakness. Within the negotiation context, the chapter explores the negotiation process.

5.2 SALES STRATEGIES

As I explained in the previous chapter, I tried to divide my findings into two different chapters of (4) and (5) to elaborate on each part specifically and distinguish the content according to the subject of each chapter. For example, this chapter contains the findings of my action research regarding the" Negotiation Tactics" and strategies recommended to improve the closing ratio of sale agents. Again, I tried to separate my results into two different chapters to separate the subjects and shorten the length of both chapters.

5.2.1 Negotiation Techniques to Improve Sales

In this section, I address the eighth question of action research.

16. **Finding Based on RQ8**

“What benefits does a huge firm have in relation to establishing a long-run investment on the sales representatives as well as limit hiring seasonal sales representatives?” Which is the eighth question of action research?

On sales strategies and negotiation techniques, it was identified that long-term sales agents could be trained to perform the same job that company strategies are set. In addition, long-term agents can be prepared for several negotiation courses each year. This is on the basis that better training can help them to have much better performance. As such, exercise cannot be done in seasonal agents. Energycare agents supported this by stating that Energycare cannot have suitable training for seasonal agents and need to hire agents to invest long-term in them. SA5, SA6, and SA7 suggested that since sales agents cannot commit to long-term positions unless paid well, Energycare should pay the sales agents well enough. In addition, Energycare should have long-term sales agents and hire some part-time in a busy season. This is based on improving the reputation of the organization.

The findings indicate that to win the customers, sales agents need to be experts in several negotiation strategies and know the required techniques to sell their equipment. In addition, sales agents need to perceive customer demands to conquer market share. To support this using the literature, Smeltzer and Rossetti, (2003) claimed to develop a sales strategy in which customers' vision and personality traits should be considered. The author believes every customer is different and deserves special treatment. The differentiation of customers is necessary, but unfortunately, it is a very difficult process. Organizations need to train their sales agents to develop competencies to be more familiar with the characteristics of their customers. Smeltzer, (2003) argue that different organizations have another way of thinking and implementing an individual action plan. The authors believe that the salesperson needs to understand the chief peculiarity of himself and possibly the customer. Knowing these key points makes sales agent jobs much easier. The following are some practical recommendations to improve sales.

5.2.2 Hiring Sales Agents with Technical Backgrounds

Concerning the literature review and the Johlke (2006) argument that organizations should retain experienced agents but develop their closing ratios in high-quality training, I have tried to explore some helpful tips to help our sales agents improve their job performances. Some critical skills like active listening, handling objections, closing techniques, and negotiation are essential for sales agents to acquire.

According to Anghelus and Boncu (2011), technical sales representatives can utilize their scientific knowledge to acknowledge the operations of the firm and the technical issues that the customers experience. This aspect is focused on providing effective solutions to consumer issues and company goals. Angheluş and Boncu (2011) claimed that the technical marketers could be incorporated in every level of the company's production process, including product research, production, development, and sales. The marketing and sales processes include shipping, branding, and advertising. In making relevant purchases, the consumers expected the salespeople to elaborate on the limitations and benefits of the various possibilities and recommend the best products and services that profoundly match their demands.

Within the sales department of Energycare, the scope of the product lines, responsibility, and brand size vary based on the firm structure and the distinct level of the departments. Within the sales and marketing departments, various sales team members are responsible for the whole process, including pricing, contracts, and negotiation mechanisms. The literature indicates that alongside meeting the demands of the company's external customers, the technical sales representatives are likely to help the company by offering profound links between the firm goals and the needs of the consumers (Decormier, 1989).

Energycare must focus on a key strategy of hiring the right technical sales representatives using three key concepts: talent, fit, and investment. Johlke (2006) believes that sales agent training has an indirect relationship to their job performance. Sales agents are the most qualified and trained organization members in that "closing" is their main concern in the sales presentation. Managers try hard to improve the skills of sales agents that lead to better job performance. However, sales agents need various types of gifts like personal and technical ones that help them to perform a better presentation. Skills like listening, adaptivity, closing, and negotiation (Johlke, 2006) are key in a sales presentation. Managers need to make sure the sales agents are qualified for such skills and talents to improve them via high-quality training (Johlke, 2006).

5.2.2.1 Talent

This concept relies on the salespeople's potential before being subjected to training, experience, and skill development. Energycare has to ensure that the individuals are highly suited to meet the company's goals and satisfy consumers. This will allow the company to reach greater heights in terms of negotiations. When Energycare hires individuals with negotiation talents and skills, they are likely to gain success concerning training and striking agreements with the consumers. The company aims to sell the products to consumers. Since selling HVAC products and services are technical, Energycare should hire individuals with related technical backgrounds besides the other skill sets required. Support from the literature indicates that their technical knowledge can help them to discuss the process of installation with customers, build trust with the customer and offer the best recommendation (Decormier, 1989)

5.2.2.2 Fit

This translates to the distinct roles of the sales representatives and their potential to adapt to the company's culture and the management and leadership styles. Energycare has to employ individuals who are easy to train. That is, the employees need to share the same objective and goals as that of the company. This will keep them highly motivated and increase their negotiation potentials to make huge sales. Some other factors can fit in this section as follow:

- English language fluency.
- Culture and nationality of individuals for selling to some niche segment market.
- Having a driver's license and vehicle.
- Having some basic computer knowledge and being able to work with salesforce & CRM.
- Having a normal appearance and behaviour.
- Psychologically be ready for stress and tensions related to the sales process.

5.2.3 Training and Coaching

According to the literature, the negotiation training practice concentrates on strengthening obtained information through regular training that comprises sufficient opportunity (D’Andrea, 2005). It coincides with the findings of this study in which the method indicates the most effective to keep up the key training process for the negotiation mechanisms. Elshenawy (2010) believes that sales agents' training can help them avoid negotiation mistakes and biases. Different training fields could gain key advantages from the findings. The training strategy could be compelling in structuring delicate aptitudes and involving other administrative fields when redesigned. Some factors like having a positive impression, from personality to intellectual capacity in negotiation, are critical in training (Abu-Nimer, 1998). The highly trained sales personnel are likely to win various bargains that enhance the firm's revenue generation. This is particularly significant for survival on intense occasions. The sales personnel who are good at their work make sure their presentation is key in promoting efficiency. At the point when officials win bargains, they become confident as well as self-regarded.

They have the opportunity of improving their association, worker's fulfillment, and assembling business systems for the firm. However, the inverse is true when they lose arrangements causing profound revenue losses. As a reflection of action research discussed in the previous chapter, we were able to offer the "Perfect visit" process that can reflect on a critical concern of employees and participants that Energycare has to develop and promote key negotiation expertise human powers via the training process.

5.2.4 Negotiation Strategies

To evaluate the strategies deeply, I decided to expand further on the key factor of "Trust" in negotiation and find out why sales agents should win their customer trust in the first steps of sales presentation.

17. **Finding Based on RQ7(2)**

"How is it key for those involved in the negotiation to develop trust among each other?" again reflect on Question seven of action research from a different angle.

In response to this question, JA4 and JA8 indicated that it is very hard to ask for customers' commitment if customers do not trust agents; therefore, agents should have different options for customers and allow them to make the right decision. JA2 and JA9 indicated that the main job of a sales agent is to build trust with the customer and that is what experienced agents normally do. JA1 said, "the best strategy is building trust and then you can sell customers everything you want". JA3, JA5, and JA6 all agreed and indicated that customers trust agents if they do the right things for the customer. Customers are smart and they can distinguish who is right and who is not. JA12 said, “best sales strategy is honesty and later trust with the customer can build”. JA7 said, “trust can be built with advising the best solution and giving them the best options to choose, not being pushy”. JA10 said, “if the customer sees agents give them different options and leave it to the customer to make the decision, trust can be built”.

The company should acknowledge that when only a single offer is placed on the table at a distinct period, the sales agent is likely to learn little, particularly when the request is turned down. On the contrary, significant gains are likely to be felt when the firm provides multiple offers (Mansour and Kowalczyk, 2015). When the consumer does not pick any of the provided offers, the sales representatives ask the consumers their preferences. This will help offer an imperative cue of what the company may find value-creating, thus generating a win-win gain. Besides identifying the win-win move, when the sales representatives provide multiple offers simultaneously, they signal their flexibility and accommodation and their desire to learn the consumers’ preferences (Mansour and Kowalczyk, 2015). This strategy also supports the relational contracting theory, emphasizing “flexibility, mutuality, solidarity, and control to maintain the relationship” (Johnson and Sohi, 2016, p.188). When making multiple offers simultaneously, it is likely for the consumers to ask for a concession before making their counteroffers or reject. The team of participants recommended that always provide three quotation packages to customers:

- Package #1: Good
- Package #2: Better
- Package #3: The best

Such behaviour can leave some options to customers, and according to the specification of each package, they can choose the one that fits their needs. Zachariassen (2008), noted in research that has been done in more than 700 B2B companies with buyers of almost $3.2 billion purchase power annually that the top seller not only “sells different products but sells it much differently with collaboration.” That can be completely true for all companies, including Energycare. If we want to sell more HVAC equipment, sales agents should collaborate more with customers (Liu and Sharma, 2011). Adapting the collaborative strategy improves the power of both parties and persuades decision-makers to buy the equipment. Zachariassen (2008), believe with applying the coordinated approach, and sales agents can take advantage of the following benefits:

1. Motivate customers to purchase by improving their engagement.
2. Strengthen the relationship and enhance the trust that minimizes friction in negotiation.
3. Improve the knowledge of customers about the products that help improve the quality of products and increase the ticket price.
4. Differentiate the company representative for customer memory.
5. Frame a sense of ownership in the customer's mind psychologically.

Liu and Sharma (2011) claim that adopting a “collaborative problem-solving” strategy is critical in improving the customer relationship and help to achieve much better results. Even though some customers are not very familiar with HVAC equipment and some rarely buy such equipment, competitors may educate the customers with different options and other models available in the market and win the customers simply by offering that particular model. Of course, such a recommendation is dependent on the authority and affordability of the organization to purchase and store several popular brands and models and make them ready to install.

5.2.5 Summary of Sale Strategies

The analysis above focused on examining the question, “Why do sales representatives have to emphasize creating value creation compared to price?” In addition, it examined the query, “How does the process of adding value assist in the process of negotiation?”

The analysis noted that increased performance is achieved by implementing the right technique and asking more within the negotiation process (D’Andrea, 2005). This section of the findings introduces the core strategies for training sales agents. I noticed that the lack of key negotiation and effective consumer handling mechanisms were the critical reasons for the limited consumer services within the sales department. The Energycare Company has the potential to implement six recommended strategies in training to ensure that the sales representatives acknowledge the significance of value propositioning. Accordingly, they have to recognize high-value prices and focus on the negotiation process while handling the consumers. In the research, I provided practical solutions based on the findings I observed from the action research. Regarding the literature review, the value proposition of organizations is categorized into four levels, including luxury, best quality, the best bang for the buck, and must have (Tjan, 2009). However, I have established that the sales representatives cannot establish extra value to provide and make negotiation deals unique in certain instances.

5.3 PSYCHOLOGICAL TRAITS THAT MAKE A GREAT SALESPERSON

In this section, I tried to reflect on the ninth question of my action research.

18. **Finding Based on RQ9**

"How should sales representatives control situations effectively and monitor their cognitive biases?" the tendency to make systematic errors which influence their negotiation performance.

SA8 suggested that "sales agents should know their income is coming from customer pocket; therefore, they should control the situation and respect customer demands, and this is an art that every sales agent should learn". The participant also indicated that "if sales agents cannot control their biases should find another job". JA7, JA9, SA10 and JA12 all agreed and indicated that controlling the cognitive biases is the most basic rule of negotiation and the sale agent should be expert in controlling themselves and knowing the psychology of customers since it helps to build trust and facilitate the negotiation process. JA1, SA5, and JA6 also indicated that all agents must understand and implement the techniques to improve their results. SA1 and JA4 indicated that such techniques can help agents to be top sales agents otherwise any individual can be an order taker.

In numerous negotiations, sales agents fail to achieve the results since they cannot identify and exploit the potentials that lie beneath their positions and interests. (Caputo, 2016) The sales agent should minimize their cognitive biases to process the information clearly and recommend the best solutions. Having more knowledge about individual differences can help negotiators to overcome cognitive biases and reach some agreements. Some factors like education, personality traits, and gender contribute to this subject (Caputo, 2016). Knowing such differences helps our sales agents to improve their competencies to understand the hurdles of negotiation and implement the strategies that lead to a reasonable solution (Caputo, 2016).

Table 7: Psychological Traits

PSYCHOLOGICAL TRAITS
Capacity to build empathy
Listen and analyze
Focus on different perspective
Insight and ability to infer
Persist and critical reasoning
The commitment consistency
Culture respect
Body language

Source: Framed by author

The given Table 7 highlights the psychological traits possessed by sales representatives.

5.3.1 Capacity to Build Empathy

Bülow and Boje (2015) argued that sales representatives have to construct compassion with prospective customers. The main explanation is that individuals purchase from individuals they trust and feel great with; then, the items and costs are optional. The individual behind the item is who the customer is buying from. If a sales representative can assemble compatibility more successfully than the competition, they will finalize negotiations even more viably. To analyze, the literature provides that compassion empowers the sales representatives to inspire the issues and needs of the customer, which moves the customer towards achieving success

(D’Andrea, 2005). The deal closes from the customer's earnestness, given their valuation for the sales representatives' worth.

5.3.2 Listening and Inquisitive

ElShenawy (2010) claimed that listening represents a crucial aspect of any business procedure. The capacity to pose inciting inquiries, get the customer talking, and practice intelligent listening evokes the customer's focus. Additionally, it arms the individuals with the potentials of negotiations and gets the customer to confide in them. For sales agents of service companies listening is the core of their calling. The aspect of posing inquiries and listening empowers them to remove their customers' perspectives and fix issues. Sales agents must be normally curious, continually examining for more data to get to the base of their customer's needs, issues, and convictions.

5.3.3 Focusing on Different Perspectives

An excellent sales agent realizes how to reason regarding what the other individual is thinking. Energycare’s sales agents need to embrace the option of comprehending and imparting on their prospect’s terms since it is at exactly that point that they will have the opportunity to lead the customer into conferring at their answer. For the company’s sales agents to have the option to carry out their responsibility, they need to think regarding their customer’s views and key positions. Being able to place themselves within the fixed point of others empowers the sales agents to prevail in their endeavours.

5.3.4 Insights and Ability to Infer

Sales agents can realize when the customer’s sentiments are not constantly expressed as planned. Accordingly, great sales representatives at Energycare can make derivations and intelligent findings, finding for some hidden meaning to comprehend their prospects' genuine implications and wants. Similarly, Eshragh et al. (2015) opined that the significant goal of an analyst is to understand the genuine sentiments of their customer dependent on the verbal and non-verbal signals that their customers show. Furthermore, the salespersons need to be able to talk adequately, briefly, and powerfully. Sales agents are required to peruse their prospects and have the skill to modify their tone, word usage, and speed to coordinate the discussion stream of their customers. When customers express disappointment, tension, or dread, the sales agent must remain quiet (Eshragh et al., 2015). The capacity to balance out and control one's outward feelings is key for keeping up an expert and powerful deal process. A salesperson's capacity to oversee and prevail in discussion with their customer depends largely on their capacity to separate sentiments without indicating dissatisfaction or bitterness in themselves. With either call, a breaking character can lose the trust of the customer.

5.3.5 Persistence and Critical Reasoning

Fisher et al. (2011) noted that this aspect represents the central nature of sales representatives who make great efforts in their negotiation processes. Accordingly, persistence is the primary approach that is effective for individuals. Having the option to remain quiet and composed while your customer is talking is core to a successful negotiation process. In addition, the sales agent needs to employ the opportunity to sensibly reason and have the skill to transform any counter into an answer. An effective sales agent never takes "NO" for an answer, and they can work their way around any objection. They make an extension among issues and arrangements, identifying how they should complete this sensible grouping apparent to their tasks (De Girolamo, 2013). Energycare has to understand that monitoring the sales representatives' self-esteem and performances are basic in ensuring that the professionals execute successful negotiations, which results in sales. Acting naturally mindful is the thing that empowers individuals to ensure they are communicating on a similar wavelength as your customer. The scholar claimed that keen insight is the thing that characterizes excellent sales representatives. Illustrating the option to anticipate, act dependent, and comprehend the customer's sentiments is critical for progress.

5.3.6 The Commitment Consistency

The most effective and popular sales psychology strategy that Energycare could accomplish involves making key continuation in the same direction. The integrative theory underpins this. Aslani et al. (2016) claimed that the theory divides the process into various phases instead of fixed points. Based on this theory, the company has to continue providing great installation and services of equipment based on the consumer demands to meet both the company's goals and consumer satisfaction. In addition, the sales representatives have to consistently offer relevant blog content, key videos, and posts alongside social elements that promote the firm's offerings. Implementing this mindset has vital impacts on consumers in various ways. In other terms, it depicts the most effective manner for the sales representatives to develop trust with the consumers and develop profound relations.

Energycare represents the brand image of the company. When the sales representatives help to become consistent with its objectives, it facilitates solidifying its image and reputation among the consumers (Allen et al., 2012). It is likely to allow the consumers to know the company and trust the salespeople every time they approach them. In addition, it is key for the company to be on top of its game. This is because the process involves hard-core marketing, and only the best survives. While most come and go, the sales representatives will obtain the opportunity to show the consumers that Energycare is here to stay when it becomes consistent.

5.3.7 Culture

The other aspect that could impact Energycare's salespeople involves the culture. Azmal et al. (2016) claimed that this aspect is the most popular among the hard-bargaining approaches specifically. The company has to come up with key ideologies to safeguard the sales representatives of Energycare to avoid concessions at the initial stages of negotiation. Nevertheless, the company should acknowledge that culture could limit them from making relevant deals and create unwanted drags away from the talks. In making key gains via this strategy, the sales representative needs to have a clear sense of the cultural values of customers, particularly in the multicultural province of Ontario, Canada.

5.3.8 Body Language

The negotiation mechanisms allow the salespeople to express the right body language and keep away from irrationalities. It is focused on enabling them to conduct predispositions and boosts the result of various negotiation circumstances (Caputo, 2016). The significant target of negotiation preparation is to provide fundamental training to the employees. The writing alludes to move as learning and gaining arrangement abilities (D'Andrea, 2005). The sales representatives need to express the correct body language and read the body language of the consumers depending on the negotiation situation (Caputo, 2016). At the point when this occurs, arrangement preparation is viewed as viable. Preparing writing underpins that preparation move relies upon four primary variables: preparing strategies, inspiration, attributes of learners, and hierarchical condition. Preparing techniques ought to be equipped for showing students the new aptitudes they need. Students must be inspired and ready to learn and gain the abilities. Associations ought to give an atmosphere that energizes applying new talents and ideas in work (ElShenawy, 2010). The nature of strategies largely influences arrangement-preparing moves.

The researcher focuses on the negotiation strategies concur on what techniques work better in preparing. Anyways, the other two variables did not increase enough consideration.

5.3.9 Summary of Psychological Traits

This section reflected on the question, “How should sales representatives control situations effectively and monitor their cognitive biases (the tendency to make systematic errors which influence their negotiation performance)?”

In promoting effective negotiation processes, the findings indicate that the sales agents have to build empathy, emphasize various perspectives, infer and make insights and increase critical reasoning. Furthermore, they have to show commitment, build strong cultures, and practice effective body language. The findings indicate that effective sales agents’ reason is profoundly based on what other people think. The Energycare sale agents have to embrace the process of comprehending the terms of prospects. It allows them to lead the consumers towards making significant negotiations, which allows them to close the deal. The literature has been referred to in various parts of this section. Different research presented in the literature on the negotiation approaches (Caputo, 2016; ElShenawy, 2010) concurs on the mechanisms that promote effective negotiations.

5.4 HOW ENERGYCARE CAN BENEFIT FROM SUCCESSFUL NEGOTIATION SYSTEMS

This section is reflection on the tenth question of my action research.

19. **Finding Based on RQ10**

“What kind of training is required to improve negotiation skills? And how does one determine the length and material of training?”

JA5 stated that “I do not know what to do when a customer says -NO-”. the participant indicated that the participant has tried different techniques to get them back, but it has been not helpful since it is important in any single presentation. JA1, JA4, JA7 and JA8 believed that training is very helpful specifically when customers reject the offer and agents need to ask for a customer business with a different strategy. JA6 said, “sales training teaches sales agents how to negotiate”. JA10 indicated that the participants always embrace such training because can increase the revenue and add more money to the agent’s pockets. JA2, JA3 and JA6 indicated that negotiation training is always the part that is missed in training, but they believed it is the most critical part that should not be avoided at all. JA11 said” such training can play a very important role in agent closing ratio” while JA9 and JA12 wished they had such training at the beginning of their job since they could have made more money.

There is a difference between negotiation and closing. In negotiation the sales agent is concerned with “how to sell the product?” while in closing, the sales agent is wondering if “will the customer buy the product or not?” (Johlke, 2006). negotiation normally as a sales presentation skill is used for dealing with customer conflicts. For example, as soon as the sales agent tries to close the deal, the customer starts conflicting consequently the negotiation begins. negotiation is only successful if the sales agents can handle the issues satisfactorily. Kozubska (1986) believe that sales agent negotiation skill can create mutual benefits to both parties and of course improve the job performance. Alexander et al. (1994) explains that sales agents who collaborate with customers and implement coordinative strategy, help in problem-solving where the customer is seeking for trust and mutual support. Sales agent of Energycare should focus on providing solutions through an open system that embraces the exchange of correct information and mutual respect. They should avoid using any baleful tactics (Alexander et al., 1994), some of which are explained in the following sections. Managers rank negotiation skills as the fifth most important skill that sales agents need to know in sales presentations (Marshall et al., 2003). The sales agent performance and higher closing ratios of Energycare sale agents are closely related to their competency in negotiation skills. Therefore, some critical points of negotiation are listed and explained below in Table 8.

Table 8: Successful Negotiation System

SUCCESSFUL NEGOTIATION SYSTEM
Consider Key Objective And Progress
Measure Negotiation Change
Establish A Negotiation Guide
Pose Correct Inquiries

Source: Framed by author

5.4.1 Consider Key Objectives and Processes

The primary aspect of achieving a significant negotiation is to start from the end and work in reverse. Identifying the key objectives alongside estimating the exhibition against the goals is the most important spot to begin. Hindriks et al. (2011) claimed that it is easy to tell when a sales representative is in the top 2 percent of their association. The direction consideration works at their specialty, providing a predictable encounter as well as an execution. These practices and activities ordinarily go before results. The process of negotiation involves innovation. The method of negotiation evolves quickly, yet a few things will consistently be the equivalent. In achieving increased sales, there is a need for the sales representatives to build up their needs and enthusiasm for their brand and decide a timetable to sell (D'Andrea, 2005). How the sales representatives present, themselves is one of a kind. If they treat each deal as equal, they could miss something. They must comprehend that each business has its purpose and goals. When entering a negotiation process, the salespersons of Energycare have to understand their agreement procedures. The process involves:

- Figuring out how to situate the product.
- Picking up procedures for talking with prospects.
- Acknowledging critical incentives.
- Finding what the optimal consumers want.

In a report by Harwood (2003), the scholar argued that the salespersons have the option to recognize their prospects' business focus and recognize it from their regular business issues. If a stage of their procedure is a slight inconvenience and represents a fundamental factor to their business' prosperity, identifying a sales focus is possible. Sales agents have to manufacture trust with their customers (Mahotra, 2014). The consumers require certain levels of certainty that the salespeople comprehend their concern and have the assets to settle it. In any case, their relationship does not end after the negotiation. Accordingly, they are morally required to satisfy their guarantee. They have to give the consumers all the assistance they need to promote an effective negotiation.

5.4.2 Measure the Negotiation Progressions

Based on the findings, it is critical to employ imperative measures to identify the loopholes in the negotiation process. When setting the goals, the sales representatives have to estimate their presentations. The goal is to determine whether they may sell at the same level after some time. When the process does not produce similar outcomes, it is time to change the process. If the salespeople measure what they do, they can take care of issues as they appear (Mahotra, 2014). Nowadays, various materials exist that can help in identifying significant measures. The process is at the core of the inbound deal's strategy. There is the need to avoid investing a great deal of energy in contacting individuals who would not like to converse. It depicts the intensity of inbound promotion. Via promoting high calibre and supportive substance, the salespersons are likely to spare time and increase their likelihood of ending deals. Additionally, when beginning an agreement, it is crucial to become famous. Numerous agents think the quickest method to do this is by overwhelming the challenge without anyone else (Mahotra, 2014). Present-day agents, regardless of their experience level, need to grasp team selling. For instance, if the individuals attempt to talk with the consumers, they have to inquire whether they can provide what they require to meet their demands and satisfy their interests. The Energycare sales representative has to utilize the mastery in their group to finalize more negotiations. This is because it allows them to learn essential abilities and enhance their sales.

5.4.3 Establish a Negotiation Guide

It is crucial to distinguish sales representatives who exceed expectations at various things. This allows others to realize extraordinary procedures towards closing troublesome prospects. The individuals have to audit their ongoing arrangement, focus on multiple parts of their assembles, and get detailed about improving each part. Along those equivalent lines, the individuals may become familiar with exceeding expectations in deals by tuning in to the best - your companions. Elfatatry and Layzell (2004) argued that it is essential to check in with your companions to sharpen their offering aptitudes and everyday work processes. Nevertheless, Energycare needs to combine with a guide to enable its salespeople to design and develop their professions. Energycare sales representatives have to focus on where they view themselves in the future.

5.4.4 Pose Correct Inquiries

In the literature, Horrocks et al. (2019) argued that inquiries show that the salespeople are ravenous for expert improvement. This allows the expertise to develop a strategy that a sales individual requires. Additionally, it is key to pose the correct questions to consumers. Question asking is an artistic expression that is rehearsed and improved after some time. The findings show that the sales representatives have to work effectively to discover which questions demonstrate most useful when talking with their prospects. In addition, they have to fabricate their library of examining queries that serve the right purpose and enhance their negotiation process. The goal is to meet the interest of the consumers and increase sales.

During the negotiation process, the sales representatives negotiating with the consumers on behalf of the Energycare Company have to make choices, which impacts if they obtain critical results for the enterprise. This is focused on getting the most effective outcome they require to understand the measures incorporated during the negotiation process.

Even though the negotiation processes can be straightforward, the literature suggests that certain occasions exist when the sales representatives are likely to face profound challenges (Elfatatry and Layzell, 2004). The achievement of the negotiation relies on the planning and the methods utilized in preparing for the process. The primary ideology is for the sales representatives to approach the negotiation with an open mind and incorporate critical strategies and approaches, which guide them from planning to closing the process.

In planning for the negotiation inquiries, it is vital to note that no preparation can be perceived as too much in meeting highly integrated or negotiations that involve high stakes. As such, the sales representatives have to plan their approach to the subject within the talks. Besides, they have to focus on their communication approaches and tones.

In posing the inquiry mechanism, it is assumed that the sale representatives have identified their primary goals within their minds, including the minimum possible results, anticipated outcome, and ideal results. Other aspects entail establishing the key instrument if the negotiation or the work expected from the negotiation process does not go as planned. It is also important for the sales representative to establish the needs of the company, the consumers, and the reason behind the demands. The sales representative has to list, value, and rank the identified issues and perceive the concessions they are likely to take. Also, he or she has to examine the other party, including their information and goals. Carry out significant research and consult where possible with the relevant individuals. Through it rehearse the approaches to be utilized during the negotiation inquiry process.

Zachariassen (2008), explain engaging with the other party when imposing inquiry during the negotiation process. The sales representatives have the obligation to introduce themselves and articulate key agenda, show calm confidence, recall their initial objectives and goals, propose key suggestions upon the inquiries, consider key compromises that promote key concessions and make relevant discussions of the ideologies and concepts. However, they should also confirm their understanding of the proposal made by the other party. As such they should be the first to make key proposals; the sales representatives should not accept the initial offer. This is on the basis that proof indicates that those who make the initial proposal are less satisfied.

Before closing the negotiation, it remains imperative to confirm the objectives of the negotiation, ensure that the outcome of the research is achievable, and articulate the already made agreements and suggestions.

5.4.5 Summary of Successful Negotiation System for Energycare

The following section focused on providing answers to the question, "What kind of training is required to improve negotiation skills? And how does one determine the length and material of training?"

The critical element of obtaining excellent negotiations involves establishing the primary objectives and evaluating the exhibitions against the goals in the most profound manner. The process of measuring the negotiation process allows for the establishment of the negotiation guideline. This aligns with the work of Hindriks et al. (2011) as presented in the literature. Accordingly, the sales representatives need to familiarize themselves with the methods utilized in the negotiation process in establishing the right communication strategy. The sales agents have to arm themselves with confident tones while posing the inquiries and sets of responses alongside strategies to the negotiation outcome, which is anticipated. Sales agents of Energycare should implement the right strategy for collaboration (Alexander et al., 1994) and do their best to build trust (Johlke, 2006) with customers. Negotiation skills are one of the highest-ranking skills that sales agents need to know (Marshall et al., 2003). Energycare managers should make sure their agents understand the importance of negotiation skills in dealing with customer conflicts (Johlke, 2006) entirely.

5.5 THE NEGOTIATION PROCESS

5.5.1 Extreme Demands Proceeded by Slow Small Concessions

The following part also presents the evaluation of the tenth question.

20. **Finding Based on RQ10(2)**

"What is the type of coaching needed to enhance negotiation skills? And how is the length and material of training determined?" this again reflects on question eight "What kind of training is required to improve negotiation skills? How does one determine the length and material of training?"

Regarding the appropriate training that is important to negotiation, JA9 said, "I personally should know how to deal with the customer in asking their business and how to turn them from "no" to "yes." He indicated that any training that can help him to have better results is helpful. This is a unique approach that influences the customer's decision. It was supported by JA1, JA4, JA6 and JA7 who stated that they needed to be taught how to win customer trust and sell them at the end. This is because they needed the training that can help them have a better result in terms of output. Their colleagues also showed interest in knowing how to win customers' trust and sell the product in the end. They were willing to be reasonable and expert in negotiating a win-win contract.

There are key commitments that the sales representatives have to observe to avoid engaging in such less productive approaches to keep disintegrating the negotiation process. Hase and Busch (2018) argued that better frameworks exist for sales representatives to meet their objectives. These approaches include posing critical inquiries, developing trust, and examining the many variations among the parties. Furthermore, the experts have to make critical preparations for their counterparts' hard-bargaining approaches. Martill and Staiger (2018) noted that this technique represents one of the most popular hard-bargaining approaches. The method safeguards the dealmakers from making quick concessions. Nevertheless, the process can prevent the parties from making unwanted deals and dragging the company out of business by limiting sales. The sales representative has to set precise goals and bring the most suitable alternatives to the negotiation agreement to enhance the bottom line. It limits ranting from aggressive opponents. Nagler et al. (2018) noted that when the sales representatives go through the negotiation process using this approach, they establish a broad category of agreements and options available upon which the negotiation process results may rely.

5.5.2 Commitment Tactics

The opponents may have their hands tied, or they may have constrained discretion towards the negotiation process. It is key to establishing whether the commitment tactics are liable in carrying out a negotiation with someone who has significant authority to carry out business with Energycare. In various bargaining events, the individuals involved take actions before as well as during the negotiation process. This usually leads to the parties committing to some of the strategically selected bargaining situations. These commitments remain partial because they remain revocable. However, revoking a partial commitment can become highly costly. The extract from Tang et al. (2014) illustrates the commitment tactic. According to the scholar, it remains less common for union officials to create excitements and determinations on the membership before negotiating the wages. Suppose the union proposes 2 dollars and perceives the management to counter the proposal with 1.60 dollars. The efforts made in persuading the administration members to pay the 2 dollars and the negotiation processes are less competent in spending the 2 dollars (Tang et al., 2014). The objective involves making it clear to the management that those within the negotiation could not accept an amount below the 2 dollars despite their wish. It was attributed to the fact that they had limited control. The other illustration is that they were likely to lose their positions when they attempted to implement the bargain. To illustrate further, the negotiators restrict the scope of their control and confront the management to strike, a situation that the union cannot avert. It remained the union's action, which constrained its authority to limit the strike.

ElShenawy (2010) noted that the structural theory is underpinned by the distribution of empowering aspects between two parties. They move from the traditional realist's power notion in which power is not considered a possession but can also be manifested in critical relations. Accordingly, the sales representatives are highly involved in product development and getting the products and services to the consumers. ElShenawy (2010) posited that various firms could invest in commodities and search for the markets in the previous years.

5.5.3 Take it or Leave it Approach

The offers provided by individuals should not be highly negotiable. In promoting this hard-bargaining approach, Eshragh et al. (2015) claimed that the sales representatives must ignore and emphasize an offer's content rather than making a counteroffer, which meets the parties' demands and needs. In inclusive of the contributions by Vincent Crawford, there are limited formal game-theory bargaining techniques, which examine the impacts of the distinct approaches employed by the bargainers and the outcome of the negotiation. Various visible tactics exist in different bargaining mechanisms. It remains imperative to acknowledge and research the impacts of the efficiency of the negotiation process in a manner that both parties' requirements and interests are met.

5.5.4 Deal Closing

As we discussed in the reflection of action research, the sales process needs some stages that we divided into three sections of

- Introduction
- Presentation
- Deal closing

The first two stages were described in detail in previous chapters, and here we briefly mention some practical techniques that can help Energycare sales agents to increase their chance for deal closing. The following recommendation mostly is a reflection of participants to the following questions: “Have you thought of new ways of obtaining an increase in negotiation?” and: “How do you handle difficult negotiation?” as well as: “How do you handle win-win negotiation?” Participants all agreed that if sales agents want to be successful, they need to go through all the stages of negotiation and ask for customer business if they have any chance in the presentation process. Deal closing is a very critical step among all steps. A successful agent should learn it to maneuver among the customer business attacks and strategically win their business. Sales may look easy, but unfortunately, as Smeltzer (2003) claims, it is a very challenging job. In this chapter, we review some critical points of deal closing required for any sales agents of HVAC companies to learn and practice in all sales presentations (Energycare, 2019). After preparation, discussion, and clarification of goals, sale agents must negotiate with the customer and sell them their products and equipment.

5.5.5 How to Close a Deal

Being an expert in closing a deal is one of the most vital skills that the sales agent should learn. Depending on the characteristics and personality of the sales agent, they can master one or more techniques that can help implement them in dealing with different customers.

Venzin (2018) noted that one of the essential parts of the sales presentation is closing. However, it invokes some emotion in the sales agent that transfers the most important step to the least important one. A study in the UK showed that out of 100 demonstrations, approximately 60 percent of them fail since the sales agents do not make any attempt to close the sale (Venzin, 2018).

The pitfalls of a lower closing ratio of the Energycare sales agent are similar to this result. Our sales agents are not asking for customer business and finish the presentation without any attempt to close it. Some sales agents feel tired after the presentation and do not make too many efforts in this critical part, while we all know that if the deal is not closed, all the seeds planted would be hollow and meaningless (Venzin, 2018). All of the deal closing techniques target one critical purpose only: hearing "yes" from the customer. In my action research, I have tried to list some feasible methods to help Energycare sales agents close the sale. I went through several articles about sales closing and asking for customer business, and we found the following as the most popular in the service industry. The first three are categorized as traditional, and the other four are modern closing techniques. Table 9 indicates the approach helpful for closing a deal.

Table 9: How to Close A Deal

How To Close Deals:
Immediate signing
Summary closing
Sharp closing
Closing with questions
Assumptive closing
Closing with take away
Soft closing

Source: Framed by author

1. Immediate Signing

In this situation, the sales agent makes an offer that creates a sense of urgency and asks the customer to purchase the equipment immediately. For example:

"The promotion is ending today" or "There is a 10% discount if you sign the contract now" or "If you buy now I can install the equipment tomorrow" or "If you buy now I can add some other accessories like a humidifier, purifier or thermostat for free."

2. Summary Closing

In this situation, sales agents summarize the deal and reiterate all the items they have discussed, and hope customers will buy. For example:

“We have the furnace and air conditioner and air purifier with 15 years parts and labour warranty, and installation is included in this price; when do you want the installation?”

3. Sharp Closing

Customers know that the sales agent expects some add-ons or more discounts. The sales agent can accept that provided that the customer commits right away. For example: if the customer asks, “Can you throw in a humidifier if I sign now?” The sales agent can say, “Sure, let me ask my manager; however, if he approves it can you sign it right away?”

In the following techniques, which are categorized as modern techniques, sales agents endeavour to understand customer needs and communicate effectively to offer the best solutions (Eshragh et al., 2015). In this situation, sales barriers are eliminated, and sales agents can ask for their business right on point.

4. Closing with a question

The sales agent is recommended to ask questions as soon as the conversation with the customer starts. In this situation, sales agents can plant the seeds to achieve the desired goals. The sales agent can ask for customer business in the form of a question while explaining the outstanding objections of the customer. For example:

“Is this what you are looking for? And is this equipment for solving your problem?”

Such questions can allow the sales agent to understand the customer's needs better and help them even more. If the answer is “no,” it means “not yet” and opens the door for further explanation and continuing the sale. If the answer is “yes,” you can ask for a customer signature. There is a good possibility that the customer is not committed yet, and the sales agent can ask, “Can I ask any reason why we will not proceed with closing and the immediate installation of your equipment?” It creates another opportunity for the sales agent to receive more information from the customer and know why they are not convinced.

5. Assumptive closing

This type of closing is connected to the sales agent’s power of positive thinking. The sales agent should monitor the customer’s interest engagement completely in the first meeting. After the meeting, the sales agent can call the customer and ask, “Is this product aligned with your expectations or not?” Or you can ask several different questions regarding the presentation and “Does the recommended equipment add any value to you?” By listening to the customer and assuming good intent, sales agents can help the customer better and invite authority and direction to their sales presentation.

6. Closing with taking away

By removing some items from the negotiation table, the customer might want it more. It is exactly like taking away toys from kids. This great strategy distracts customers from the price if they ask for more discounts. Remove some items from the contract if they ask for more value, and they will mostly concentrate on the removed things than the price.

7. Soft closing

This can be a great approach for dealing with marketing leads by asking low-impact questions. By showing the customer the benefits of equipment and asking soft questions, we can ask them if they are interested to know more about the supposed benefits. For example, “If I introduce some high efficiency furnaces that can reduce your energy bills by about 30%, would you be interested to learn more?" In this situation, you already explain some features of the equipment without making any demand. This approach certifies customers that there is no need for any commitment, and they can easily learn more about the benefits of the equipment.

5.5.6 How to Close Tough Customers

In an article written by (Venzin, 2018), he recommends 9 different approaches for closing the deal with challenging customers. He argues that it is great if the customer shakes your hand and agrees with your price and equipment smoothly. However, he believes it is not always that easy and sales agents face many challenges when meeting demanding customers. He recommends 9 great strategies that can help deal with picky customers. In the service industry, especially the HVAC business, timing is critical, and agents should quickly ask for the customer's signature (Energycare, 2019). If the customer tries to push agents around and waffles continuously in the deal process, the chance that the deal will go through is very minimal, and it might not even lead to any sale. Therefore, it is recommended that agents peruse the following steps in dealing with such customers. Table 10 below specifies the process in which tough customers can be closed.

Table 10: How to Close Tough Customers

HOW TO CLOSE TOUGH CUSTOMERS
Never show anxiety and never react
Be firm and strong
If required, match their behavior
Get deep in their concerns
Ask them what exactly want
Their commitment right away
Get control the conversation with customer
Do not prove your power to them
Make business and personal separate

Source: Framed by author

1. Never show anxiety and never react:

If the customer feels the sales agent is nervous or scared, they will try to push the agent around and be more aggressive. In this situation, agents should try to be ignored and try to speed up the sales process. Sales agents can, in this situation, change their approach in response to customers' bad attitudes. Agents should remain calm and stick to their notes and sale presentation.

2. Be firm:

In a tough situation, it is very natural for agents to be frustrated. We are all human beings, and our feeling can be hurt. We could be uncomfortable and feel disheartened. However, frustration only kills opportunities for agents and loses their customers. Always remember that customers still need your help and what you sell. Never take it personally and stick to your principles. Leave emotions aside and hold on to your sales presentation strategies.

3. If it is required to match the behaviour:

There are some occasions that agents have no other choice except to respond and match the behaviour. It might be necessary to be similar to them, raise your voice, and change your attitude (Eshragh et al., 2015). Then you can see they back off in response. If agents match the same personality, they might obtain more respect and hold the customer's attention.

4. Get deep in their concern:

Customers have different issues in their minds and might not be ready mentally to listen to agents. It is advisable to ask them to talk about their problems and do not force them to listen to you in this situation. Agents can find a way to get closer to the customer and feel them out (Fisher et al., 2011). With the customers who decline to deal with you and are tough in negotiation, getting them to talk about their business problems can help the agent understand their priorities and recommend a solution.

5. Ask them exactly what they want:

Professional sales agents can ask customers what their short- and long-term goals are and their priorities. They might have a different objective but have trouble expressing that. According to the customer's priorities, agents can offer them the best solution.

6. Get their commitment right away:

Agents need to find out how serious the customer is about their purchase. How immediately do they need to solve their business problem? Instead of asking if the customer wants to buy his equipment or not, it is better to ask if the customer is committed to doing it right now. Agents should think that they might not have a second chance to visit them if they lose the customer in this situation.

7. Control the conversation with a customer:

There are some occasions upon which the customers steal the conversation and steer it away in different directions. The customer does not allow the agent to talk and continues speaking over the agent. In this situation, the agent should control the situation and interrupt the prospect politely by asking them to be concentrate on the presentation. The sales agent can say, for example, "Excuse me, I would appreciate it if you could concentrate on my points for now and I promise to explain this point right after I finish my presentation." Such a maneuver can allow the agent to attract customer attention again and change the subject of conversation to the customer's collective goals.

8. Do not even think about proving your power to the customer:

Some phrases like "Actually," Did you know," and "No offence" is used to show dominance in conversation. Agents might be persuaded to position themselves as authority figures when dealing with challenging customers. They can do it by sharing the information and asking customer opinions about it. For example, instead of saying, "Did you know that Carrier furnaces have an issue with their secondary heat exchanger?" you can say, "I heard that Carrier furnaces have an issue with secondary heat exchanger, is your furnace still ok?" In this situation, instead, you present a fact to the customer and ask his opinion.

9. Take business separate from personal:

Always remember challenging customers are part of the business game, and you should not take their attitude very seriously. Sales agents should always be polite and respect customers, and if something goes wrong, leave the meeting and report to the office to handle the situation. Try to make yourself relax with a lovely dinner and family gathering and make yourself prepared for a much more successful day the next day.

5.5.7 Some Closing Mistakes Should Be Avoided

Venzin and Rutschmann (2018), argue that to be successful in selling the product, you do not necessarily have to be a salesman; however, you should master the process of sales techniques and negotiation. Converting sales opportunities to sales, sales agents need to think fast and have an intelligent discussion with customers (Venzin and Rutschmann, 2018) The sales agent should grab all the leads to work but should not expect all the tips to turn into a successful sale (Johlke, 2006). Sales agents should be patient and maintain an equilibrium between delivery work and sales work. Besides, they need to have faith in the price and value of their products and expect an entire pipeline of upcoming success (Venzin, and Rutschmann, 2018). Some sales agents try to close the deals but unfortunately make some awful mistakes that do not help them win the customer but lose them forever (Venzin, and Rutschmann, 2018). I have included some critical mistakes that some sales agents make, which they should learn to avoid. Here are some Do Not-s that sales agents should never forget. Table 11 below illustrates the mistakes that are required to be avoided.

Table 11: Mistakes should be avoided

Some Closing Mistakes That Should Be Avoided:
Ask for costumer business once only
Using statements not questing
Not creating deadline and urgency
Talking when should be quiet
Not having all decision maker ready
Making deal with third party
Applying underhanded tricks
Closing too fast
Not care bottom lines
Walking on deal
Talking too much
Not ready to hear "no"

Source: Framed by author

1. Ask for customer business once only

Sales agents need to keep asking for customer business and find an opportunity to either plant seeds or "close the deal." Some agents try only once, and as soon as they are rejected give up and never try again. Sale agents should never give up and keep trying their chances until they are fully convinced there is no other hope to win the prospect.

2. Using statements, not questions

The closing statements should always be a question, but some agents use statements. The answer is very clear when the sales agent asks a question -- prospects should answer directly. However, it is not required in a statement. The sales agent should avoid some statements like "I'd like to" and "Maybe we can." In these cases, they are not closing and instead should ask "would you" or "can you."

3. Not creating deadline and urgency

There are only two reasons for purchases, need and time. If customers need your product but at the same time have some other priorities, it is a great possibility that your deal will be declined. It is not enough to identify the problem; sale agents should combine the right solutions with the right timing. Customers should understand why they should act fast and lose the deal if they do not close it now.

4. Talk when you should be quiet

There are sometimes in the negotiation that sales agents should be quiet. Most of the time, sales agents rush to comment on customer answers right away, for example.

Sale agent: Can I meet you today?

Customer: Sorry, I am busy

Sale agent: That is ok, we can meet another time, maybe

There is a great chance if the agent remains silent, the customer will answer the question before it is even spoken.

Sale agent: Can I meet you today?

Customer: Sorry, I am busy

Sale agent: Silence…

Customer: But I am available Tuesday.

5. Not have all the decision-makers on the table

Do not negotiate with the wrong person. Make sure that the one who is negotiating has the authority to commit to your agreement. Have all the stakeholders at the table and make sure they are all listening to your presentation and fully understanding your products and services.

6. Making a deal with the third party

I have seen a few occasions wherein agents tried to deal with someone close to the homeowner or the customer. For example, they deal with tenants or someone in the house but has no authority to make a decision. The sales agent should only negotiate with the decision-makers, not anyone else, except for rare special situations during which they do not directly access the customer.

7. Applying underhanded tricks to close

Sales agents should deal with the customer with honesty and integrity. Some agents try to use dishonest tricks to deal with customers, which is entirely wrong. Some agents try to use tricks to push the customer to make a deal before they are completely ready. Such schemes put pressure on the customer and do not work that well.

8. Closing too fast

The sales agents should not ask for the customer’s business at the beginning or midway of their presentation. Never cut corners and always finish the sale process before talking about the price.

9. Not caring about the bottom line

Making a sale should benefit you and your company; otherwise, it is wasting time and resources. It is great to make a deal, but you should not hurt your company. Try to accommodate your buyer as far as possible, provided that they commit to purchasing and that the terms are not so far away from the company's bottom lines.

10. Walking on a deal

Sales agents sometimes lose the closing by saying “or” our “and” at the end of their closing question. For example, instead of asking, “Can I meet you today?” and waiting for an answer, the sales agent hastily asks another question, “Or maybe tomorrow?” Sale agents should try to eliminate customer choices, whereas words like “or” and “and” create a selection.

11. Talking too much

Sales agents should always know silence is their best friend on some occasions and should not talk too much and spoil the situation. Sometimes agents get excited and cannot stop talking until they accidentally introduce doubt into the customer’s mind.

12. Not ready to hear “NO.”

If the buyer disagrees with you and says “no,” the worst thing to do is argue with them. It means you are not confident enough to take “no” from your customer. In this situation, the customer might lose faith in you and cut their connection with the company. Instead, you can say "okay" and ask them if they have any other alternative that makes sense. This can signal to the customer that you can take an unfavourable answer without getting irritated. Such an approach can raise your status in their eyes and help you to hear "yes" next time.

5.5.8 Negotiation Conceptual Model

As I mentioned in the literature review, distributive methodologies involved selfish parties that are endeavoured to win negotiations (Anghelus and Boncu, 2011). At the same time, the integrative strategy considers both or all the interested parties. In this approach, parties of both sales agents and customers consider the win-win situation, and both parties try hard to reach an agreement (Anghelus and Boncu, 2011). The process allows for the sharing of ideologies between the individuals attributed to the structure of the negotiation process. Integrative frameworks utilize target measures to make states of common increase and underscore the importance of considering key interests among groups and gaining critical reasoning (Caputo, 2016). Attributed to the fact that the integrative frameworks underscore joint decision-making and participation, integrative techniques require the Energycare Company to agree and work collaboratively to make win-win arrangements. This strategy is along with the theory of Ma (2005), who believes that "Agreeable negotiators "can create trust among the parties versus "Individualistic negotiators" that perceive it as a win-lose process." We all agreed that Energycare should be building trust with its customers to keep them in the business family for a long time.

The heating and cooling company must produce alternatives, reveal interests, and share aspects between the individuals. Other striking commitments to integrative negotiations incorporate arrangements, which view transitional aspects within the process as stages in a joint-basic negotiation form. This mechanism can provide an operational guide to Energycare's sales representatives. Caputo (2016) said that the mediators could make progressively productive arrangements for their dealings and have a higher probability of traversing through negotiations effectively. In the meantime, HVAC corporations must be willing to concede to lower their prices based on customers' factors requiring discounts. In return, companies may benefit from customer loyalty and high sales. Thus, the two parties concede and benefit at the same time. As explained in the literature review the "Yielding strategy," Liu and Sharma (2011) believe the "existence of the loyal customers is more important than new ones and maintaining the loyal customers is much cheaper than trying to achieve an additional one" (Liu and Sharma, 2011). Therefore, companies that are willing to negotiate with customers based on the offers they provide in exchange for customer loyalty or diversification stand a chance of enjoying the benefits of increased sales. However, some suggestions may pose low returns in the short term.

5.5.8.1 Perfect visit:

The presentation book can touch on the critical points of installation and all the crucial factors that add value to customer service jobs. It gives agents and teaches them how to go through all the issues of the book in several iterations of training courses and make sure they are following all the steps one by one. Even though any sales agent may have their specific approach in sale presentation and might use different techniques and strategies to win customers, the key points of the new presentation book are comprehensive. Besides, it helps the agents touch the critical issues of sales according to the professional company of Energycare. It makes sure all the points are followed step by step. Every sales individual is different and might have different approaches in dealing with customers. However, they can add this book to their presentation but apply their strategies to cover all points.

5.5.8.2 Value propositioning:

The value proposition predicts the values specified by a corporation that contains the summaries of the company’s produce delivery, product experience, and the service acquired. More importantly, it sets the idea behind its attractiveness, why it is the best choice for customers, and why the product or service values are unique from relative contributions. As stated by the scholar, the growth of a value proposition is vital with regard to the business strategy of a company. This is because it provides a company with the ability to impact the customer’s decision-making when regularly displayed on its marketing materials (website). In addition, it is an effective instrument to drive sales and build a consumer base. Therefore, it can enhance the effectiveness of the marketing technique of a company. To develop a perfectly tailored value proposition, a company needs to identify its product or service benefits. A piece of more detailed information on the valuable benefits of the product or service makes it easier for a customer to make a quick decision. It is also crucial for a company to identify its customers’ issues, which the value proposition will address.

5.5.8.3 Negotiation system:

In negotiation, the sales agent is concerned with “how to sell the product?” Negotiation, normally as a sales presentation skill, is used for dealing with customer conflicts. For example, as soon as the sales agent tries to close the deal, the customer starts conflicting; consequently, the negotiation begins. Negotiation is only successful if the sales agents can handle the issues satisfactorily. Sales agent negotiation skills can create mutual benefits to both parties and, of course, improve the job performance. Sales agents who collaborate with customers and implement coordinative strategies help problem-solve where the customer is seeking trust and mutual support. The sales agent of Energycare should focus on providing solutions through an open system that embraces the exchange of correct information and mutual respect. They should avoid using any baleful tactics. Managers rank negotiation skills as the fifth most important skill that sales agents need to know in sales presentations. The sales agent performance and higher closing ratios of Energycare sale agents are closely related to their competency in negotiation skills.

5.5.8.4 Deal Closing:

Being an expert in closing a deal is one of the most critical skills that the sales agent should learn. Depending on the characteristics and personality of the sales agent, they can master one or more techniques that can help implement them in dealing with different customers. One of the essential parts of the sales presentation is closing. However, it invokes some emotion in the sales agent that transfers the most crucial step to the least important one. The pitfalls of a lower closing ratio of the Energycare sales agent are common. Sales agents are not asking for customer business and finish the presentation without any attempt to close it. Some sales agents feel tired after the presentation and do not make too many efforts in this vital part, while we all know that if the deal is not closed, all the seeds planted would be hollow and meaningless. All of the deal closing techniques target one critical purpose only: hearing “yes” from the customer.

The key factors of the sales presentation and negotiation process are summarized in Table 12 below. Here, the above Table 12 demonstrates the sales and negotiation and presentation process.

Table 12: The Process of Sales Presentation and Negotiation Process

STRATEGY	PERFECT VISIT	VALUE PROPOSITIONING	NEGOTIATION SYSTEM	PSYCHOLOGY	DEAL CLOSING	PRICE COMPLAIN
Collaborative Win-win Hire Right Agent Talent Fit: English/ Culture Driving License Computer Knowledge Behavior & Mentally Ready	Part 1: Home Comfort Survey Part 2: Competencies Part 3: Recommendat-ions and Reviews Part 4: Process of This Visit Part 5: Key Feature of HVAC Equipment Part 6: Pictures Part 7: Sizing of Equipment Part 8: Safety Features Part 9: Installation Part 10: Inspection Checklist Part 11: Guarantees Part 12: Models and Brands	Value propositioning Offer customer the smart choice Timing and fast response is the best Calculate the importance of each point Consider the interests of customers Look at value propositioning from the customer point of view Custom thermostat & monitoring system: Temperature Monitor Water leak Shut the main water Video monitoring of property Doorbell video and communication open the door Smoke detector	Consider key objective Measure negotiation change Establish negotiation guide Pose correct inquiries	Build empathy Listen and analyze Focus on different perspective Infer Critical reasoning Commitment Culture respect Body language	Immediate signing Summary closing Sharp closing Closing with question Assumptive Soft closing Tough customers No anxiety Be firm Match behaviour Get deep in concern Ask what they want Commit right away Control conversation Not prove power making business and personal separate	Explain about product value. Explain the cost of not having that value Dig in their concern Closing mistakes Ask for business once Using statement No deadline Talk too much Not have all decision maker Deal with third party Be tricky Closing too fast Not care bottom line Walking on deal Not ready to hear “no”

Source: Adopted from (Liu and Sharma (2011)

5.5.9 Summary of Negotiation Process

This part also presents the evaluation of the same question, “What is the type of coaching needed to enhance negotiation skills? And how is the length and material of training determined?”

In providing solutions to this question, the research findings indicate the critical negotiation techniques would offer significant benefits to Energycare. One of the identified techniques includes extreme demands followed by small and slow concessions. Accordingly, the sales agent generates a bargaining position via statements calculated to promote the public’s opinion, thus enabling the concessions. In this strategy, the sales agents try to gain the trust of their customers by offering different alternatives (Hase and Busch, 2018) and making themselves ready for any potential conflicts in negotiation. Furthermore, the findings suggest the commitment tactic. In this approach, the sales agents should support Energycare with technical aspects and meet the consumers’ needs. In comparison to the literature, this section coincides with Fisher et al.‘s (2011), which acknowledges that sales representatives should not perceive limited discretions to negotiating with the consumers. Instead, they have to implement all measures possible to establish the relevant commitment tactics that are relevant and genuine.

In sections 6.1-6.5, various aspects make great sales agents. Arguably, different techniques illustrate effective negotiations, particularly for accomplishing key outcomes. The utilization of negotiation tactics includes employing accessible ways of arriving at the desired outcome (Angheluş and Boncu, 2011). Process-oriented mechanisms and structural strategies focused on crucial negotiations share a distributive comprehension of negotiations. As such, Energycare sales representatives view negotiations as a critical benefit with the end goal that business expertise is gained. According to Angheluş and Boncu (2011), the negotiation deals are observed as a pie that benefits everyone. However, the allocation depends on the skills and understanding the salespeople portray to the consumers, allowing them to create significant negotiations. Therefore, the process incorporates frameworks that focus on utilizing the arrangements to augment the pie and enhance the benefits. Subsequently, these methodologies summon techniques that are distributive or predatory. They are intended to verify the most incredible cut conceivable of the pie, as mentioned earlier, for one side while leaving the opposite side with the smallest helping possible. Various strategies utilized in distributive negotiations are, along these lines, proposed to enable the sales representatives to employ them to guarantee an incentive for themselves. Since focused techniques produce win-lose results, many, especially the individuals who are a part of the integrative school, view such procedures as dangerous.

Concerning section 6.7 discusses the negotiation process, enhancing the negotiation process of a sales representative, which, in the end, involves the technique utilized, the methods employed in closing the deal, and the offering made (Carneiro et al., 2013). Having the option to foresee how salespeople act in such situations allows them to expand their preparation for the negotiation process. Furthermore, by predicting critical decisions, the sales agents gain the opportunity to accomplish better results at the negotiation table and refine their systems.

Even though anticipating limitations are usual, the scholars believed it is imperative to limit their various negotiation processes. By conducting speculations, Energycare can clarify negotiations as groupings between character types that often appear as polarities; for example, the firm can focus on fighting for all. Therefore, it portrays key aspects that involve sharing the perception that negotiations, regardless of the people and businesses involved, concern the person in question. In this case, the individuals are consistently sound (Carneiro et al., 2013). Furthermore, the mechanisms can be deterministic in that they regularly see results based on the earlier comprehended components. Based on this mechanism, the sales agents in Energycare perceive the negotiations as struggle situations between parties who keep up contrary objectives.

The fundamental hypothetical commitment obtained from the critical framework is the assumption that power is the central deciding element in every negotiation. Therefore, the sales representatives need to identify the focal point of gaining power and control over the negotiation process. According to Azmal et al. (2016), the general intensity of each negotiation influences the capacity to verify the parties' objectives through the process. Therefore, in identifying the primary point of gaining power over the negotiation process, the sales agents must ensure that both parties' benefit (Bejinaru et al., 2016). Bejinaru et al. (2016) posited that various factors affect the negotiation process. In any case, the negotiators must acknowledge that paying respect to the subsequent fulfillment of different parties can be an effective strategy if the opposite sides free their will and keep up on the arranged understanding.

5.6 CHAPTER CONCLUSION

The chapter began focusing on negotiation techniques that can impact sales. On sales strategies and negotiation techniques, it was identified that long-term sales agents could be trained to perform the same job that company strategies are set. In addition, long-term agents can be prepared for several negotiation courses each year. This is on the basis that better training can help them to have much better performance. Sales with technical backgrounds are also influential when it comes to sales. They possess critical skills like active listening, handling objections, closing techniques, and negotiation. Besides, they can utilize their scientific knowledge to acknowledge the operation of the firms and the technical issues that the customers experience. With a reflection of Energycare, it is significant for the company to hire qualified personnel with the right technical skills by using key concepts such as talent, fit, and investment. Sales agents need various gifts like personal and technical ones that help them perform a better presentation. Skills like listening, adaptivity, closing, and negotiation are essential in a sales presentation. Managers need to ensure the sales agents are qualified for such skills and talents to improve them via high-quality training. Training and coaching of sales representatives are also crucial in improving sales in Energycare. This is because highly trained sales personnel are likely to win various bargains that enhance the company's revenue generation through improved efficiency.

Psychological traits are also addressed in the chapter. In promoting effective negotiation processes, the findings indicate that the sales agents must build empathy, emphasize various perspectives, infer and make insights and increase critical reasoning. Furthermore, they have to show commitment, build strong cultures, and practice effective body language. The findings indicate that effective sales agents' reason is profoundly based on what other people think. The Energycare sale agents have to embrace the process of comprehending the terms of prospects. It allows them to lead the consumers towards making significant negotiations, which will enable them to close the deal. The literature has been referred to in various parts of this section. Other research presented in the literature on the negotiation approaches concurs on the mechanisms that promote effective negotiations.

CHAPTER 6: CONCLUSIONS

This research focused on providing an effective negotiation conceptual model for the Energycare Company. In the study, action research is employed at various levels to obtain relevant outcomes. The process involved gathering a group of individuals working in the company as sales agents. Therefore, there was a need for a conceptual negotiation model, which has been presented. Concerning this context, Björkman and Sundgren (2005) mentioned that actionable knowledge is the one that is critical and significant. Furthermore, in a different research article, Chevalier and Buckles (2013) claimed that knowledge is needed to promote key relevance to the aspects of practice. The following presents the summary of the findings during the study. The process facilitated the primary lessons established during the implementation of the action research to develop the primary negotiation frameworks that would be the best work for Energycare Home Services.

The first cycle of the action research mainly was turning around the following questions. "How important is the training of the sales agents and qualifying them with negotiation strategies?" and "Is technical knowledge or sale knowledge alone adequate concerning selling the HVAC products of Energycare? Or do sales representatives have to be trained in effective negotiation approaches?"

As an outcome of the study, the evaluation shows the level of description of the negotiation frameworks utilized by the sales agents. This element helped in determining the critical features in negotiation processes. The process signified an essential source of information since it posed a significant challenge for most of its sales agents. The negotiation mechanisms posed critical threats to most of the staff as they impacted the career of those who could not deliver significant outcomes as demanded by the company. As an action researcher, I believe that bringing information to the surface with substantial content for the firm's success was imperative to the company's success. However, it was evident that the employees who could not increase their output were likely to be laid off since the company was focused on growing sales and gaining a competitive edge within the consumer markets. In the first cycle of action research, some disharmony was detected between the marketing and the sales divisions of Energycare. Moreover, misalignments between theoretical structures and practical implications were detected. Therefore, some valuable strategies are recommended to minimize the noticed gap. Some negotiation steps, including introduction, qualification, presentation, and closing (Decormier, 1989), were introduced, and a comprehensive presentation book called "perfect visit" was recommended accordingly. In the findings, we proved that training plays a critical role in the performance of sales agents. Agents must be equipped with negotiation techniques as technical knowledge is not enough to perform satisfactory results. The recommended "Perfect visit" can help Energycare's agent get deep value propositioning and improve the customer expectations. It contains some measured steps that guide sales agents to go through all the steps one by one and align the interests of both customer and seller together at the end of the presentation (Goldner, 2007).

The second cycle covers the importance of value propositioning to justify the price. In this section, we asked: "Why it is important for sales agents to add value to their product?" this question was very critical, and the findings are remarkable.

Considering the dynamic business environment in which consumers want quality and fast services, quick service calls are imperative for these approaches towards adding value for the consumers. The sales agents have to acknowledge the significance of value propositioning from the fixed point of the consumers. Noteworthy, effective sales agents distinguish themselves from others by going the extra mile compared to their rivals. With reference to one of the pieces of literature, Fisher et al. (2011) claimed that key negotiation approaches depict the background for sales agents who focus on making key efforts within the negotiation process. Energycare's sales agents are the company's brand image. Their consistencies facilitate the solidification of the firm's reputation, thus promoting trust among the consumers.

The other aspect discussed in the findings involves posing the right inquiries. In comparison, ElShenawy (2010) stated that before closing the negotiation deal, it is key to make profound confirmations of the negotiation objectives to guarantee the study's outcomes and articulate the agreement. The value proposition is a critical factor that Energycare agents should pay attention to seriously in their negotiations. The principle of "High-value and High-price" of D’Andrea (2005) was utilized in the cycle, and the "smart thermostat" was introduced that can be considered as a unique value to Energycare products and can rarely be offered by small competitors. Other strategies recommended Energycare can utilize offering customers smart choices that can solve customer issues in smart ways and the timing of customer demand by having all competencies ready to meet customers' demand quickly. Furthermore, the company can calculate the importance of each point to see if it is worth it to spend too much time and effort on trivial points. The firm also has to consider value propositioning from a customer perspective and conduct heat loss calculations for accurate sizing of the heating and cooling equipment.

The third cycle of action research was about the sales techniques and the negotiation strategies that help sales agents close the deals and win customers. In this action research cycle, I tried to evaluate "how value-driven is our company?" and "how can different layers of corporation help improve the sales ratios?" We noticed that Energycare could create innovative plans that allow agents to escape the "price trap" at the end of the presentations and offer customers great affordable solutions. The "HVAC Rental Equipment" was recommended in this cycle that allows agents to provide different packages to customers with a low monthly payment. Such payment includes the price of equipment, warranty, and maintenance over a longer period to make the payments more affordable. As a new payment method (Kemper and Deufel, 2018) and higher maintenance and repair costs (Miao et al., 2016), deferral payment is two important factors that guide me to offer such a solution for this cycle. Considering the financial competency of our corporation, offering such packages are feasible and operational for Energycare and can be smoothly implemented. I tried to expand the concept of "Rental Water heater," which already exists in Energycare, to "Rental HVAC Equipment," hoping to persuade the marketing and strategic managers to think twice about adopting such an affordable solution. The existing rental water heater plan can be easily modified to offer something similar for "Rental HVAC Equipment" and train sales agents to present it to customers. Riesterer et al.'s (2019) strategies were utilized in this process, including changing the customer status quo and making customers aware of such undiscovered demands.

The third cycle also examined the negotiation techniques and the importance of deal closing. The benefits of long-term investment on sales agents were evaluated, and it was noticed that sales agents should be experts in sales strategies to win their customer's trust and sell their equipment. Customer vision and personal traits of purchasers were taken into consideration (Smeltzer, 2003). Some recommendations were proposed to help Energycare hire talented individuals that can fit in the corporation's culture. By offering the multiple packages of "Good, Better and Best" to customers, the win-win strategy (Mansour and Kowalczyk, 2015) was persuaded. As such, it supports the "flexibility and mutuality theory" of Johnson and Sohi (2016) and the integrative strategy of Anghelus and Boncu (2011).

A compelling sales agent within Energycare should investigate customers to ensure that they are a solid match. Also, they must adhere to their optimal purchaser persona and know precisely to whom they are offering their services. Their instincts drive those representatives who fail to make huge sales within the company. On the other hand, those who make huge sales utilize a procedure enhanced to move whatever number of prospects as expected under their associates' circumstances. Those who continuously have low performances neglect things through the cracks. Key sales representatives know the condition of each arrangement in their paths, what moves they are to make, and when. They also survey their key measurements and alter them as required. The analysis above focused on examining the question, "How important is it for sales agents to learn negotiation skills?" To process the information clearly, sales agents should eliminate their cognitive biases to offer the best solutions. I demonstrated that sales agents who know the individual differences could minimize their cognitive biases and propose solutions based on customer demands and requirements. In the findings of this cycle, some strategies were recommended to handle the customer conflicts and explained that negotiation is lucrative if the agent can take the customer problems successfully (Mahmoud and Adika, 2018). Some critical factors of negotiation were reviewed, and their application is explained in the sales presentation. Deal closing is the most important part of each negotiation (Venzin, 2018); therefore, every sales agent should be a master of at least one or two techniques that are matched with their personality. Consequently, several methods of "deal-closing," strategies for "handling tough customers," and some "mistakes that should be avoided" by Energycare sales agents were discussed in detail to help our sales agents to improve their competencies to win their customer trust.

For the company's sales agents to have the option to carry out their responsibility, they need to see from their customer's viewpoint and understand their primary objectives. Being able to place themselves in someone else's shoes others empowers the sales agents to be successful. Bülow and Boje (2015) consider negotiations as learning processes wherein the individuals acknowledge the concession attributes of the other parties. From this viewpoint, exchanges involve the progressions of various concessions. The concessions are engaged in different negotiations. The mechanisms can be employed in the negotiation processes of Energycare to identify their expectations and support other people's opinions. The findings also provided how the sales agents can make critical negotiations and close the deal. This compares to the work of ElShenawy (2010). The scholar argued that the sales representatives have to close the deal smoothly when dealing with important customers. However, this may not be easy, particularly when handling demanding consumers. In this way, the identified strategies of closing the deal are effective in addressing the challenging consumers.

6.1 THE REFLECTION OF MY LEARNING PROCESS

I have been a severe and highly engaged leader with crucial expertise in order, authenticity, structure, values, integrity, self-direction, and simplicity in obtaining critical achievements. However, I believe that I have certain limitations that I would require attention to. Within the period of the DBA research, I have learned so much about the Energycare Home Company (Cedrola and Battaglia, 2016). Mainly, I have learned more about the consumer negotiation aspect that I have investigated in this study with other colleagues. My learnings are not limited to negotiation concepts. Still, they include value propositioning and the step-by-step procedure of sales presentation, and how organizational culture can impact the performance of employees and closing ratios of sales agents. The following section presents an illustration of my learning in the various areas and an evaluation of my reflections based on action research.

6.2 MY LEARNING EXPERIENCE OF ENERGYCARE HOME

I knew the company because I had worked at Energycare as a Sales Manager for some time. Despite knowing the company, I was new to the sales and marketing department. As such, I had to familiarize myself with the department. My engagement and involvement in the action research allowed me to note that I had a lot that I needed to know. Additionally, I learned as I collaborated with the research team to address different subjects that affected the negotiation in Energycare Home services. Undoubtedly, various research pre-assumptions existed. These were experienced before the research process and were validated during the research course. I acknowledged how my knowledge of the company was superficial. Besides, I also identified the company's culture and how I had taken for granted its impacts on the negotiation processes. According to Ribeiro (2011), management structure and culture play a crucial role in the negotiation strategy of a company. This further depicted its potentials to increase sales, generate huge revenues, and gain a competitive edge within the consumer markets. Before the research, I took a pre-study of the organization's divisions that I did not know properly and became aware of its operations and development milestones. However, I noted that I did not take my time to identify the structural formation and culture of the firm, including how the sales and marketing department carries out its operations to achieve profound sales. The functions of the company were effectively understood by the executives at the top of the organization. In this manner, I took my time to engage the management in the research to learn more about the organization. The management was highly cooperative and provided a new dimension of gaining the employees' trust. This is because the only way that I would gather relevant data that I required to help the team in formulating a new negotiation framework was to gain the employees' trust. It was so apparent that the staff was not willing to open up to strangers. The team managed to understand the internal dynamics and the routine operations of the firm by building trust with the employees.

As I reflected on my encounter with the management and obtained the opportunity to learn more about the company's internal environment and operations, the image reflected in my mind was that of a painter making a city painting. Accordingly, the painter was keen not to leave any details of the town, including a broken glass window on a building at the corner or a dry leaf dropping from a tree nearby. The mechanism of making such a painting is like effective management and leadership; it requires skills, reasoning, paying attention, and taking time to ensure accuracy (Ribeiro, 2011). The painter, alongside his brush and paint, has vital control of the outcome of the portrait. The resultant image represents a portrait that has to be handled with profound care. In the first stages of the portrait, the painter makes drawings and colour-coding that may not make any sense. The painter may also alter the colour of the paint to replace those that do not rhyme with the image's colour. The final product may not be modified after the paint has dried out. What remains is placing a frame to make the image more presentable. The learning about Energycare and its operations and the negotiation strategy represent the painter's time-consuming work. However, the research outcome is the development of a practical negotiation approach for the company's success.

First, before learning about the company, I got the opportunity to identify its stakeholders, tagline, website, mission, vision, and operation process. Furthermore, I got the chance to learn more about the General Manager of the company. Despite being involved in the daily management and running of the company, the manager occupies a profound position in depicting the entire path of the company. Many of the employees within the company consider the manager as the primary pillar of the firm. Similarly, the manager has particular regard for the subordinates (Rezaie and Rosen, 2012). I recall he stated in an interview, “When the staff is satisfied, they are likely to improve on their performances, and specially treat the consumers.” Additionally, he claimed that the company’s primary focus towards the employees has been providing practical training and motivating them to increase their efforts and performances.

I believe that how the Energycare Home Company handles consumers is distinct. I established that the company has distinctive features that separate it from its rivals. While the distinctness of the company is quite challenging to describe in theoretical forms, the General Manager states that the consumer is the king. As underpinned by the work of Rezaie and Rosen (2012), I conceptualize that being a consumer-oriented company, Energycare is big and has excellent competencies; it is powerful and can invest in innovative technology and approaches to add value. On the other hand, this aspect also poses tremendous limitations for the company when the company has to adopt some changes, which is understandable in such a big corporation. Also, it would be hard for a new manager, especially the sales and marketing manager, to adapt to the company’s work environment. I obtained information from the department that several leaders had gained the chance to join the team that had challenging times adapting to its culture. However, they admitted to obtaining great support from the staff as well as other executives. The assumption I made of the challenges faced by the marketing team was their limited connection with the sales team. However, this has to be validated by further research. I believe that the uniqueness of the company also deserves additional study. In the action research, I got the opportunity to filter the insights into its unique nature and its distinct negotiation strategy (Rezaie and Rosen, 2012).

While most of the employees supported the firm's negotiation and sale training strategies, some argued that it was time the company employed different strategies to promote its sustainability and gain a competitive edge within the industry (ElShenawy, 2010). The primary focus was placed on the negotiation frameworks to encourage sales. The process was perceived as a retrospective manner of traditional value propositioning of Energycare marketing which could not develop to Tier 1 with such mentality. The company does not operate a monopoly. As such, it has to be aware of the ever-evolving market competition. These perceptions paint the strategies of the company in negative connotations. Reflecting on the primary ideologies, it was imperative. The journal entry that I made in my small handbook was critical in the success of this DBA project (Appendix E). First, I believe that I became part of a profoundly operating company characterized by a distinct work culture. During the period that we held the DBA project and commenced the action research, the atmosphere was charged, and I perceived that a single spark would have led to extreme measures. I noted that the ideologies presented in this context were portrayed in the culture of the company. Being an insider but with limited knowledge of the firms and their staff, I realized that I had to face various dilemmas and ethical challenges. I believed that I had the chance to navigate the ideologies of the primary stakeholders to identify the limitations and advantages of Energycare sales strategies without leaning on any of the sides. I posited that the evaluation of the critical perceptions and opinions provide positive contributions to the conceptualization of the negotiation strategy of the Energycare Home Company.

The perception of following a similar routine can be tedious and redundant. Besides, other than the normal, it can sometimes fail to produce significant outcomes. I realized this throughout the action research. During the research process, I managed to generate different vital questions, which I established as imperative in obtaining the information required for the DBA project's success. Furthermore, the questions which I formulated were critical and I believe would be significant for any researcher in the field who would want to make an expansion of my research:

- Is continuing with traditional culture and focusing mostly on previous company customers an effective strategy with the ever-changing business environments and consumer demands?
- What if doing things, as outlined by the norm, is not the right strategy in all business situations, especially when handling consumers. What would you do differently?
- Do you always have to commit to the norm despite reflecting key limitations and losses?
- What are the implications of having the former negotiation framework or implementing an alternative negotiation strategy as recommended in this action research?

6.3 LESSONS LEARNED FROM THE NEGOTIATION STRATEGY

The negotiation issue at the Energycare Company was the primary focus of this research. Accordingly, the company's strategy denoted an immense malady that was beneath a broader image. As I proceeded with the team to the inquiry mechanisms, the negotiation process of the company seemed to influence other primary operations of the firm, including its success. The negotiation process of Energycare is not based on a systematic presentation, and sales agents are not following any presentation book that can help them in a routine procedure. Managers have a hard time helping them improve their sales techniques as the training and learning process of Energycare is limited and still relies on individual talents.

6.4 LESSONS LEARNED ABOUT MY POTENTIAL

In various sessions with the research team, we went through different activities that described each team member's perspective via the perspective of others in the group. My team members utilized certain words, including creative, discipline, severe, focused, structured, and harmonious. However, there were others, which were harsh, conservative, surprising, and abrasive. Besides, they felt as though they provided illustrations of other people. The following process represented a sobering start about learning of the self-potential and personalities. Furthermore, it depicted a primary precursor to the understanding of oneself. In the research, I realized that I have the potentials to impact other team members positively. Additionally, I have the skills of leading people towards a common objective (Angheluş and Boncu, 2011). It was highly reflected in the study because I managed to lead the team toward working towards a common aim of establishing the most comprehensive negotiation strategy for Energycare. I also reflected on my leadership as well as my communication style. Additionally, my use of imagery and storytelling techniques allowed me to develop tacit knowledge and the capabilities of becoming profoundly insightful (Angheluş and Boncu, 2011). I was highly confident during the action research process. This was because I upheld my leadership skills and potentials to effectively practice my leadership brand without having the urge to conform to any un-authentic leadership strategy.

Based on a reflective standing point, I incorporated an imperative conceptual element in the study because I got involved in profound practice and training. My presentation of obligations towards my colleagues involved ensuring that the team members worked in coordination and that every person carried out their roles effectively to ensure success. What the employees want and pursue and their preferences to self-objectives had key impacts on how I internalized the knowledge I gained from the project. As underpinned by action research, I was a close observer. However, I was also an active listener as well as a participant. It was further reflected in the work of Aula (2010). I established convergence within the study process based on my leadership approach. Therefore, it depicts primary frameworks of appreciating the efforts of others to obtain critical solutions to various problems on their own. The leaders have to encourage and support the team throughout the research process.

6.5 THE LESSONS ABOUT MY RESEARCH TEAM

Within the first phases of the action research, the team members made imperative assumptions that it was pretty fast, straightforward to develop new negotiation strategies to solve the problem faced by the Energycare Company. During one of the group meetings, a team member noted that the challenge was not complex. There was the need to separate distinct features, activities, and individuals to carry out each of the activities. Additionally, the individual posited that it was crucial to measure the impacts of the ideologies and opinions selected. The effects of the identified solutions to the management offered vital insights based on the recent poor services of the company. One of the respondents claimed that:

The company only lacked coordinated and reinforced impacts of the sales management based on the potentials of the individuals to show adverse effects concerning the negotiation framework (Aula, 2010). A participant mentioned that strict consequences had been imposed on those who do not meet the company’s merits in terms of increased sales. The firm believes that when the employees do not face critical consequences, they are less likely to avoid taking their work seriously and adopting necessary corrective measures.

The other significant learning aspect involved developing trust among the staff and the researchers. According to Aula (2010), the trust level between the staff and the research team was highly significant in obtaining the correct information for evaluation and formulating the right negotiation strategy for the company. The employees within the lower levels of the company's hierarchy had limited trust, as they only believed their executives and the General Manager. All the staff required the acknowledgment of the team to be open enough to provide the information that we needed during the action research.

6.6 MY LEADERSHIP ROLE IN THE RESEARCH

When we carried out the action research, I got the chance to replicate the attitudes and beliefs of the entire team. This allowed me to obtain a deeper understanding of the conceptualization of my leadership mechanism. The above aspect depicted my different inspirations for the success of the DBA project. I was previously slow to learn more about my leadership potentials, articulate my leadership brand and promote my authenticity (Aula, 2010). However, the research allowed me to realize various qualities that were hidden in me. I realized that I am a work in progress and a curious individual who emphasizes order, simplicity, authenticity, and integrity. However, during the research period, I acknowledged that coordination and working as a team are highly significant for the success of any project (Aula, 2010). This was achieved through the trust and understanding of all the team members. Additionally, there was the obligation of assigning duties to the team member who had the skills of completing the work within the required time. This process represents the foundation of my leadership strategy through profound confidence in working with a team. My authenticity comes from the use of narrative. Nevertheless, I am focusing on developing my newly acquired self to promote my leadership potentials and achieve greater heights.

6.7 IMPLICATIONS OF PRACTICE AND KNOWLEDGE

According to Coghlan and Shani (2014), the DBA studies focus on meeting the demands for increased formal learning and opportunities in conducting doctoral research on significant aspects. The benefits of the studies are meant to serve both the academics and the practitioners. Via the implementation of the action research in exploring the negotiation techniques that can be utilized in landing consumers and increasing the company's sales, the following research makes a profound and actionable contribution to business and consumer relations. In a different study, Chevalier and Buckles (2013) claimed that it is the knowledge needed to promote external validity and promote key relevance to the aspects of practice. The following presents the practical reflections as well as experiences that were identified during the study.

On the other hand, I noticed profound disharmony across and within the marketing and sales departments of the company. The limitations were linked to the various mechanism utilized in increasing sales. Accordingly, there was limited coordination between the executives and the sales agents concerning the critical negotiation frameworks. Also, significant misalignments were evident between the theoretical expectations and practical implications. This further impacted the link between the company's objectives and the values and the personnel's missions enacted on the ground.

In this action research cycle, I received several angry emails and phone calls regarding the purpose of my action research and how it can help the company in general. The outcomes of the study and how it examined the limitations of the firm's negotiation strategy were embraced by the firm's executive. However, some of the staff were displeased by the ideologies. Based on this context, I noticed that various elements of the research caused significant discomfort for the staff involved because the action research posed key queries that covered the company's entire operations. Furthermore, questioning the company's existing sales presentation and value proposition irritated some people in the marketing and sales support departments. The process also involved listening and engaging the whole team of Energycare. In addition, during the research process, it was observed that the groups were encouraged and inspired to implement their strategic plans. In this manner, all the staff in the hierarchy were accommodated and encouraged. While the mechanisms seemed beneficial and key in the action research, they threatened the regular operations of the firm. The excitement illustrated by the executives at first was observed to diminish with time. This led to some elements of hostility towards the end of the research.

On the other hand, the board remained highly encouraging, cooperative, and supportive during the entire process of the research. The executives at the top management were highly focused on the success of the project and demanded project updates within the time the study was enacted. The coordination level and support promoted the profound and successful completion of the research. Most of the sales personnel within the sales department were supportive of the study. The description of this action research was best described using the key terms supportive, reluctant, and enthusiastic. These aspects described the company's management from the top to the bottom of the hierarchy level. I was trying to obtain critical solutions and information from the reluctant section of the organization posed essential hardships for this research. On the other hand, the extreme coordination and support I obtained from the top management proved as a mechanism for easing my ways to the success of the research.

6.8 PRIMARY TAKEAWAYS

Based on the evaluation of the study, I would provide specific lessons to the various researchers who seek to implement action research in the DBA projects. The first element is to become highly prepared for anything. The threat that one could work themselves out of their employment positions is practical. It is imperative to examine the dangers and evaluate the next best alternative before implementing action research. Binding actions that can be considered when the initial process fallback is critical in this type of research. Concerning this, I had made key preparations for the study because I could identify various alternatives if my first strategy did not work out the way it is supposed to. Fortunately, I never had to employ my alternative strategies because my initial action research strategy worked out just fine. Action research can positively propel a researcher's career by differentiating the researchers from their colleagues. This is because it helps to position the potential of the researcher to solve profound organizational issues since the process incorporates various internal stakeholders of the company who work together to handle key problems within the company. The common objective is meeting the company's goals and pushing the firm towards gaining a competitive edge within the consumer markets. Concerning this, if the action researcher works for the firm, the researcher's potential is to promote their profile.

There is also the need for seeking support when required and at the perfect time within the study. It is quite challenging for an action researcher to gain profound success without the help of the internal stakeholders of the company. This is because the researcher requires total trust from the employees to deliver critical information to enrich the research process. To illustrate this, I needed the help of the managers and the supervisors to gain the personnel's trust, thus increasing my trust levels and the amount of information that I could obtain from the personnel. If I did not have the support I required from the executives, I could have faced increased frustrations and various challenges in my research.

Furthermore, I would be wise to create rapport. In other terms, an earlier visit to the company and informing the internal stakeholders of the objective of the research and its purpose would help promote the readiness of the personnel in the action research. Concerning my experience, I believe the concept is not conducive to all companies. Some companies' structure and work culture may be less significant on the action research's intrusive aspect. Additionally, certain sections of the firm may be highly cooperative compared to other departments. It is in the researcher's interest to examine the firm's readiness to support the internal action research process. Concerning this research, I felt like Energycare was more conducive to internal action research when I focused on conducting the DBA program research.

Also, I established that it remains a priority to isolate the unique nature of the organization that the researcher focuses on conducting action research. I realized that it is worthwhile to establish the distinct elements of the organization to promote the success of the research. Considering what is critical for the company's culture helped in the navigation of the company and the understanding of its operations. Furthermore, it helped me address the company's issues that I focused on handling, including formulating and implementing an effective negotiation strategy that would allow the firm to obtain increased sales and gain a competitive edge within the consumer markets. The organization's distinct aspect lay in how it valued its consumers and the quality of consumer services it offers. The company is consumer oriented. The culture of the company impacts every element of the reality of the firm. Obtaining an acknowledgment of the fact enabled me to navigate my way within the firm and in all the departments thus, limiting the tension between the staff and me. I also realized that it was key for me to understand and make known my unique nature. This promoted my leadership potentials. I perceive my contribution to the firm as highly critical and presented a section in the proceeding chapters to reflect the Research Action processes. I focused on promoting an effective negotiation strategy for the company. The primary objective of the action research process was to identify the most appropriate negotiation strategy for Energycare to strike key sales deals with the consumers.

6.9 THE RESEARCH LIMITATIONS

It was imperative to observe that action research helped to achieve the main goal of the DBA research. Nevertheless, certain constraints were experienced during the study. These limitations prevented the extensions and opportunities for further evaluations.

One of the study's primary limitations was that the research involved only a single firm, Energycare. Coghlan and Shani (2014) noted that such limitations of distinction are common in case study research. As such, the study's outcome could not be employed in another firm attributed to the unique nature in which different companies operate. Furthermore, the significant reliance on the participants' views can be cumbersome and inaccurate, especially when the participants choose to provide wrong answers.

This action research depended on the opinions and views of the respondents. Besides, no interviews were carried out by the staff in the branches and the top management to cross-validate the outcome of the questions asked. The limited engagement with the respondents attributed to the limited timeframe for conducting the research constrained the results of this research. No interviews were conducted with the firm's general manager. The involvement of the company's general manager was only contained in the routine regular interactions with the internal stakeholders. The review of the current theories linked to the study was limited, and the research failed to profoundly engage the literature on the sales management and marketing frameworks. I had vital challenges in that I had limited opportunities to engage in a joint reflection on the crucial elements of the research. The limitations that I have listed in this research act reveal that other future researchers would seek to carry out profound studies on this niche.

6.10 OPPORTUNITIES FOR FUTURE STUDIES

Based on the action research employed in this DBA study, various internal and external opportunities can be realized that impact the operations of the Energycare Company. The action research was used in this study to identify the practical negotiation approach for Energycare in promoting sales and revenue potentials. In this case, there are vital gaps that were not covered in the research, including the company's sales management and marketing strategies. It is attributed to the fact that these mechanisms can hinder the operations of the salespersons, impact the demand levels of the consumers, and either increase or reduce their loyalty levels. The research opportunities may extend to other niches within the firm, including the marketing approaches and sales operations and the engagement in the various consumer segments. The research processes would extend the evaluation to other firms within the same niche and those within the related sectors. The impact analysis could be employed in future research to evaluate the effect of the consumer negation process and the extent to which the researchers obtained the needed alterations within the firm. A prospective study could also focus on an alternative research process. The establishment of a comprehensive and significant negotiation strategy could be reviewed using a different research process. Accordingly, the study outcomes could be contrasted to that of the action research to identify if the company can exploit additional opportunities to maximize its negotiation processes and increase sales. It would also provide room for the analysis of the ideal strategy for the company. The study identified the distinct nature of the Energycare firm, which is underpinned by its unique consumer-centric nature. There is the chance of exploring the existence of a particular culture of the company that defines its operations. Moreover, it can be examined to make critical comparisons with other companies to identify their potential source.

The DBA program I have embarked on completing is critical and significant in reinforcing my practical skills, experiences, and acknowledgments. These insights, experiences, and understandings were necessary because I understood how I could implement them in my practice routine, particularly when faced with real-life issues. The study and the action research process prepared me for the outside world of research. Accordingly, I learned that I could handle any challenge or dilemma that I would encounter during my future career. This is because I realized positive aspects and critical lessons linked to obtaining solutions to various business-related issues. I have also been able to reflect on different beliefs and attitudes, which inform the decision-making process both at organizational and individual levels. This has allowed me to gain the potentials of promoting a critical acknowledgment of my possibilities as a researcher.

In the preceding sections of this study, the content incorporates self-acknowledgments of my role and responsibility as an action researcher in the process of identifying the most comprehensive and significant strategy for negotiation.

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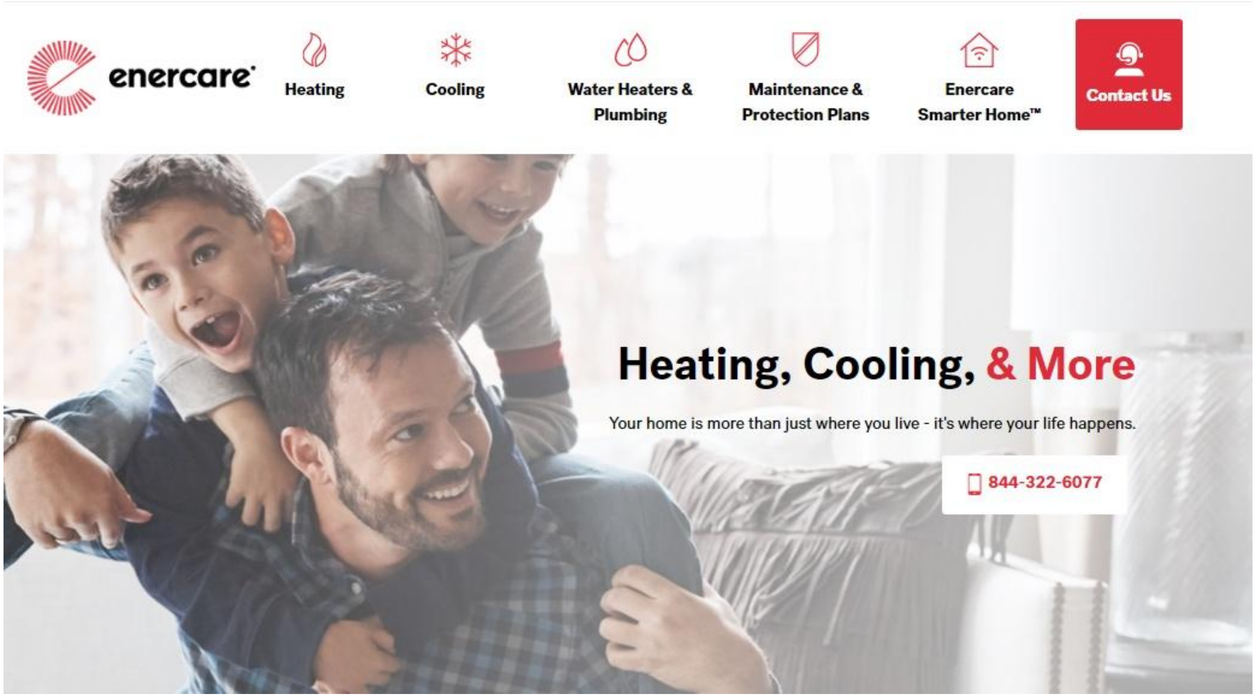
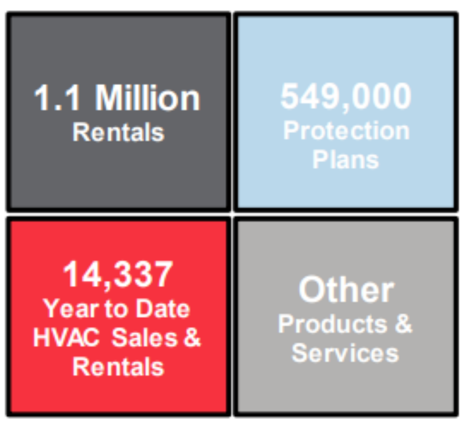
APPENDICES

Appendix A: Energycare Services



Enercare Home Services Business

There are four main business activities within Enercare Home Services: Rentals, Protection Plans, HVAC Sales and Other (which includes duct cleaning and chargeable services). The following diagram shows the breakdown of customer contracts for each such activity as at the end of the third quarter of 2017.



Appendix B: Research Information Sheet Template

Committee on Research Ethics

Participant Information Sheet

Study Title

Developing a Conceptual Model for Negotiation Techniques in Canadian Service Companies Including the HVAC Businesses

Invitation paragraph

You are invited to participate in this research. However, prior to acknowledging whether to take part in the study or not, it is critical to be aware of the project as well as its objectives. Kindly read the information below carefully.

What is the purpose of the study?

Unfortunately, HVAC companies do not believe in long-term investment in training their sales agents, since most of them are either commission-based employees or short-term subcontractors. In this research, I am going to challenge such strategy and prove that one of the most fundamental investments in service companies, especially in the Heating Ventilation and Cooling (HVAC) industry, is emplacing right business strategies of negotiation and hiring long-term agents to contribute in success of their organization.

Do I have to take part?

YOUR PARTICIPATION IN THIS PROJECT IS BASED ON YOUR OWN WILL. THOSE WHO DECIDE TO TAKE PART IN THE RESEARCH WILL BE PROVIDED WITH THIS SHEET. ADDITIONALLY, THEY WILL BE REQUIRED TO SIGN THE CONSENT FORM. HOWEVER, ANY PERSON WILL BE ALLOWED TO WITHDRAW THEIR PARTICIPATION AT ANY TIME AND LEVEL DURING THE STUDY.

What will happen to me if I take part?

Those who wish to take part in the project will be allowed to answer certain questions linked to the research objectives and questions. The process will incorporate qualitative including interviews

What are the possible disadvantages and risks of taking part? (Where appropriate)

Certain limitations exists. For instance, the study could take a lot of time. The participants will be required to take part in the interviews that will take up to one hour to complete

What are the possible benefits of taking part?

What are the possible benefits of taking part?

The benefits of this research is that it will increase awareness on negotiation processes and potentials of increasing sales.

Will my information in this study be kept confidential?

The information relating to the background as well as other relevant data from the participants will be kept confidential. Confidentiality, anonymity, and privacy will be maintained by ensuring that the participants' names are not included in the study. Unwanted people will not be allowed from accessing the data form the participants.

What should I do if I want to take part?

To take part in the study, the participants have to read and understand the information sheet. After that, they have to sign the consent form to ensure that they are taking part in the study at their own will.

What will happen to the results of the research study?

The data obtained from the participants will be utilized in the analysis of the projects. The data will help to provide key information for the project, which will be published in Enercare and the institution's webpage. The participants willing to obtain a copy will have to send their request to the institution.

Who is organising and funding the research?

As a researcher, I intend to carry out the research as a student of University of Sussex. The research will not be funded by any organization.

Who has approved this study?

The study has been approved by the School of Business Administration, University of Liverpool ethical review process.

Contact for Further Information

For any information or concerns, you can contact me through my institution

Thank you

I highly appreciate your time and dedication for being part of this successful research.

Date: August 14, 2019.

Appendix C: Confidentiality Form

CONFIDENTIALITY FORM

Title of the project: Developing a Conceptual Model for Negotiation Techniques in Canadian Service Companies Including the HAC Businesses

I..., have been invited to take part in this research project

I agree to -

1. keep all the data shared with me confidential via avoiding the discussion or sharing of information in any form or format []
2. maintain the safety of the participants' information []
3. Return all research information in any form or format such as, disks, tapes, transcripts, when I have completed the research tasks.[]
4. Destroy or delete all research information in any form concerning this research project after the research []

__________________________ __________________________ ____________________

(Name) (Signature)

(Date)

Researcher(s)

__________________________ __________________________ ____________________

(Name) (Signature)

(Date)

Appendix D: Research Participant Consent Form

RESEARCH PARTICIPANT'S CONSENT FORM

Project Title: Developing a Conceptual Model for Negotiation Techniques in Canadian Service Companies Including the HAC Businesses

Researcher (s):

I voluntarily agree to take part in the study. []

I acknowledge that I have the potentials of withdrawing at any time or refuse to answer any question without any consequences of any kind. []

I have acknowledged that I can withdraw permission to utilize the information I offer after which it will be destroyed or deleted. []

I had the research explained in detail to me []

I understand that I will not directly benefit directly from taking part in this study.

I agree to my interview to be noted. []

I acknowledge that the information provided in the study will be treated as confidential. []

______________________ ______________________ ______________________

(Name) (Signature)

(Date)

Researcher(s)

______________________ ______________________ ______________________

(Name) (Signature)

(Date)

Appendix E: Sample Journal Log

MONITORING PLAN							
Monitoring Priority	**Who Will Use the Info?**	**Purpose of the Info?**	**When is the Info Needed?**	**Who will Collect the Info?**	**How Often will it be collected?**	**How will it be collected**	**Proposed monitoring Tool**
Boundary Partner's Achievement of Outcomes	The Research Team	Promoting flexibility	Before the first Cycle	Research Manager	Every 30 minutes	Observation	Outcome Journal
Program's Strategy (ies)	The Research Team	Promoting flexibility	Before the first Cycle	Research Manager	Every 30 minutes	Observation	Strategy Journal
Program's Organizational Practices	The Research Team	Promoting flexibility	Before the first Cycle	Research Manager	Every 30 minutes	Observation	Performance Journal

Appendix F: Interview Worksheet Exhibit

We appreciate your efforts and time towards taking part in this research interview. We hope that the answers you will provide during this interview will be beneficial to this project.

Questions

Q1 Do you consider yourself part of EnerCare's success?

Q2 Can you provide your role within the company?

Q3 Can you provide an idea of your initial negotiation process?

Q4 How has the company's culture influenced the negotiation style?

Q5 What role do you play in the company's negotiation process?

Q6 Have you thought of new ways of obtaining increased negotiations?

Q7 How do you promote a win-win situation?

Q8 How do you handle difficult negotiations?

Q9 What experiences have you had with meeting the targeted sales?

Q10 What do you do if you do not meet the company's targeted sales?

Q11 How technology helped you in improving values in negotiation?

Q12 Are you able to adopt to new negotiation models?

Q13 How do you apply the new negotiation model to obtain success?

Q14 How Company can help you to improve your negotiation techniques?

Q15 What do you expect to be done to smooth the negotiation process?

Q16 What is type of training have you had so far? And do you believe it can help in improving your performance?

Q17 Is EnerCare promotions are effective. In addition, how do you think they can help you in winning your customers?

Q18 What is the length of your presentation and do you think it is short, long, or ok?

Q19 DO you have any standard presentation book to explain the details gradually?

Q20 If have the presentation book? Do you think it covers all the subjects that need to be explained to customer? What do you add or remove from it?

Q21 How pictures and video can help in presentation? In addition, your negotiation process?

Q22 Do you think adding value to products help in your negotiation process? Alternatively, is wasting resources and money?

Q23 How can we compete in market with adding value to customers?

Q24 How and what do you recommend in value propositioning.

Q25 Is there any chance to give quotation over the phone. When? Why?

Q26 If you have two type of leads, Tech lead and In-bound or Out-bound lead, which one do you run? Why?

Appendix F: Questionnaire Worksheet Exhibit

Part A: Background

1. Gender? Male [ ] Female [ ]
2. Age? Under 25 years [ ]
   25-30 years [ ]
   31-40 years [ ]
   Above 40 years [ ]

3. What is you highest level of education?
   Secondary [ ]
   Diploma [ ]
   Higher learning [ ]
   Others [ ]
4. What is your expertise level within the organization?
   Less than 1 year [ ]
   2-5 years [ ]
   6-11 years [ ]
   12-20 years [ ]
   Above 20 years [ ]
5. For how long have you been working as a salesperson at ?
   Less than 1 year [ ]
   2-5 years [ ]
   6-11 years [ ]
   12-20 years [ ]
   Above 20 years [ ]

Part 2 : Questions on Sale Expertise

6. Are you comfortable making cold calls?

- Yes, I am comfortable
- I believe I can be comfortable
- No I am not comfortable

7. Have you consistently met your sales goals?

- Yes I have met my goals consistently
- Sometimes I find it hard to meet my sales goals
- No I have not consistently met my sales goals

8. What motivates you?

9. How did you land your most successful sale?

10. How would you describe your negotiation tactics?

11. What interests you most about the company's sales position?

12. What makes you a good salesperson?

Part 3 : Questions on Negotiation

13. What is the significance of the negotiation strategy

14. Has time ever been a factor in closing a deal?

15. Do you have an alternative negotiation strategy?

16. Select the number that matches your negotiation skills from the once below:

A

1. I acknowledge when the offer is too good to be true
2. I can identify when an offer has strings attached
3. I know when the market is pressuring for a purchase

B

1. I attempt to investigate issue with consumers to find answers
2. I try to integrate consumer ideologies to make a joint decision

C

1. I accommodate the consumer wishes
2. I give in to the consumer wishes
3. I meet the expectations of the consumers

Appendix G: Survey response by expertise and location

Response by Expertise	
Senior Agents	16.7%
Junior Agents	16.7%
Sales Managers	8.3%
District Managers	2.7%
Customers	27.8%
Employees	27.8%
Response by Location	
GTA East (North York)	55%
GTA North (Barry)	25%
GTA West (Hamilton)	20%

Appendix H: Interview Schedule

Participants	Role	Forms Emailed	The forms Returned	Interview Location	Transcription Date
SA1	Senior Agent	August 14	Email	GTA East (North York)	October 24
SA2	Senior Agent	August 14	Email	GTA East (North York)	October 23
SA3	Senior Agent	August 14	Email	GTA East (North York)	October 24
SA4	Senior Agent	August 14	Email	GTA East (North York)	October 26
SA5	Senior Agent	August 14	Email	GTA East (North York)	October 25
SA6	Senior Agent	August 14	Email	GTA East (North York)	October 25
SA7	Senior Agent	August 14	Email	GTA East (North York)	October 27
SA8	Senior Agent	August 14	Email	GTA East (North York)	October 26
SA9	Senior Agent	August 14	Email	GTA East (North York)	October 24
SA10	Senior Agent	August 14	Email	GTA East (North York)	October 29
SA11	Senior Agent	August 14	Email	GTA East (North York)	October 28
SA12	Senior Agent	August 14	Email	GTA East (North York)	October 29
JA1	Junior Agent	September 10	Direct	GTA North (Barry)	November 11
JA2	Junior Agent	September 10	Direct	GTA North (Barry)	November 11
JA3	Junior Agent	September 10	Direct	GTA North (Barry)	November 11
JA4	Junior Agent	September 10	Email	GTA North (Barry)	November 14

JA5	Junior Agent	September 10	Email	GRA West (Hamilton)	November 13
JA6	Junior Agent	September 10	Email	GRA West (Hamilton)	November 11
JA7	Junior Agent	September 10	Email	GRA West (Hamilton)	November 11
JA8	Junior Agent	September 10	Email	GTA North (Barry)	November 11
JA9	Junior Agent	September 10	Email	GTA North (Barry)	November 13
JA10	Junior Agent	September 10	Email	GTA North (Barry)	November 11
JA11	Junior Agent	September 10	Email	GTA North (Barry)	November 12
JA12	Junior Agent	September 10	Direct	GTA East (North York)	November 13
EM1	Employee	September 10	Email	GTA North (Barry)	November 15
EM2	Employee	September 10	Email	GRA West (Hamilton)	November 15
EM3	Employee	September 10	Email	GRA West (Hamilton)	November 15
EM4	Employee	September 10	Email	GRA West (Hamilton)	November 13
EM5	Employee	September 10	Email	GTA North (Barry)	November 13
EM6	Employee	September 10	Email	GTA North (Barry)	November 17
EM7	Employee	September 10	Email	GTA North (Barry)	November 14
EM8	Employee	September 10	Email	GTA North (Barry)	November 18
EM9	Employee	September 10	Direct	GTA East (North York)	November 15

EM10	Employee	September 10	Direct	GTA East (North York)	November 15
EM11	Employee	September 10	Direct	GTA East (North York)	November 11
EM12	Employee	September 10	Email	GTA East (North York)	November 25
EM13	Employee	September 10	Email	GTA East (North York)	November 22
EM14	Employee	September 10	Email	GTA East (North York)	November 24
EM15	Employee	September 10	Email	GTA East (North York)	November 22
EM16	Employee	September 10	Email	GTA East (North York)	November 23
EM17	Employee	September 10	Email	GTA East (North York)	November 22
EM18	Employee	September 10	Email	GTA East (North York)	November 29
EM19	Employee	September 10	Email	GTA East (North York)	November 22
EM20	Employee	September 10	Email	GTA East (North York)	November 27
CU1	Customer	September 21	Email	GTA East (North York)	November 27
CU2	Customer	September 21	Email	GTA East (North York)	November 23
CU3	Customer	September 21	Email	GTA East (North York)	November 21
CU4	Customer	September 21	Email	GTA East (North York)	November 23
CU5	Customer	September 21	Email	GRA West (Hamilton)	November 22
CU6	Customer	September 21	Email	GRA West (Hamilton)	November 29

CU7	Customer	September 21	Direct	GRA West (Hamilton)	November 29
CU8	Customer	September 21	Direct	GRA West (Hamilton)	November 22
CU0	Customer	September 21	Direct	GRA West (Hamilton)	November 29
CU10	Customer	September 21	Email	GRA West (Hamilton)	November 23
CU11	Customer	September 21	Email	GRA West (Hamilton)	November 29
CU12	Customer	September 21	Email	GRA West (Hamilton)	November 17
CU13	Customer	September 28	Email	GRA West (Hamilton)	November 22
CU14	Customer	September 28	Email	GTA North (Barry)	November 22
CU15	Customer	September 28	Email	GTA North (Barry)	November 29
CU16	Customer	September 28	Email	GTA North (Barry)	November 21
CU17	Customer	September 28	Email	GTA North (Barry)	November 21
CU18	Customer	September 28	Email	GTA East (North York)	November 24
CU19	Customer	September 28	Email	GTA East (North York)	November 17
CU20	Customer	September 28	Email	GTA East (North York)	November 17
SM1	Sales Manager	September 28	Email	GTA East (North York)	November 29
SM2	Sales Manager	September 28	Email	GTA East (North York)	November 17
SM3	Sales Manager	September 28	Email	GTA East (North York)	November 29

SM4	Sales Manager	September 28	Email	GTA East (North York)	November 29
SM5	Sales Manager	September 28	Direct	GRA West (Hamilton)	November 17
SM6	Sales Manager	September 28	Direct	GTA East (North York)	November 18
DM1	District Manager	September 28	Direct	GTA East (North York)	November 18
DM2	District Manager	September 28	Email	GRA West (Hamilton)	November 18

Appendix I: Growth Analysis of Energycare

Growth Analysis of EnerCare Inc. (ECI | CAN)

The Growth Score is a relevant measure for the assessment of a stock attractiveness. EnerCare Inc. shows a Growth Score of N/A.
The Growth Score for EnerCare Inc. is lower than its peer group's. This means that EnerCare Inc. has a lower growth than its peer group.

Valuation

	EV/EBITDA Last	EV/EBITDA(e) 2020	EV/EBITDA NTM
International Peers	Free trial	Free trial	Free trial
Building Materials & Fixtures	8.33	7.96	7.92
N/A	N/A	N/A	N/A
Canada	-3.18	5.97	6.05

More...

Betanull

	Levered beta	Unlevered beta
1-Year	N/A	N/A
2-Year	N/A	N/A
3-Year	N/A	N/A

GPRV Analysis

GPRV® analysis is not available due to one of the following reasons:

- Company is not covered by analysts (no estimates)
- Company is an insurance company

Appendix J: Q&A Check List of Energycare

Appendix (J) is removed in edited version.

Appendix K: Limited Warranties of Carrier HVAC equipment

CARRIER CORPORATION

turn to the experts

Limited Warranty for Air Conditioner & Heat Pump Condensing Units with Puron® (R-410A) Refrigerant

FOR WARRANTY SERVICE OR REPAIR:

Contact the installer or a Carrier dealer. You may be able to find the installer's name on the equipment or in your Owner's Packet. You can also find a Carrier dealer online at www.carrier.com

For help, contact: Carrier Corporation, Consumer Relations, P.O. Box 4808, Syracuse, New York 13221, Phone 1-800-227-7437

PRODUCT REGISTRATION: You can register your product online at www.carrier.com.

Model Number ______________________ Serial Number ______________________

Date of Installation ______________________ Installed by ______________________

Name of Owner ______________________ Address of Installation ______________________

Carrier Corporation (hereinafter "Company") warrants this product against failure due to defect in materials or workmanship under normal use and maintenance as follows. All warranty periods begin on the date of original installation. If a part fails due to defect during the applicable warranty period Company will provide a new or remanufactured part, at Company's option, to replace the failed defective part at no charge for the part. Alternatively, and at its option, the Company will provide a credit in the amount of the then factory selling price for a new equivalent part toward the retail purchase price of a new Company product. Except as otherwise stated herein, those are Company's exclusive obligations under this warranty for a product failure. This limited warranty is subject to all provisions, conditions, limitations and exclusions listed below and on the reverse (if any) of this document.

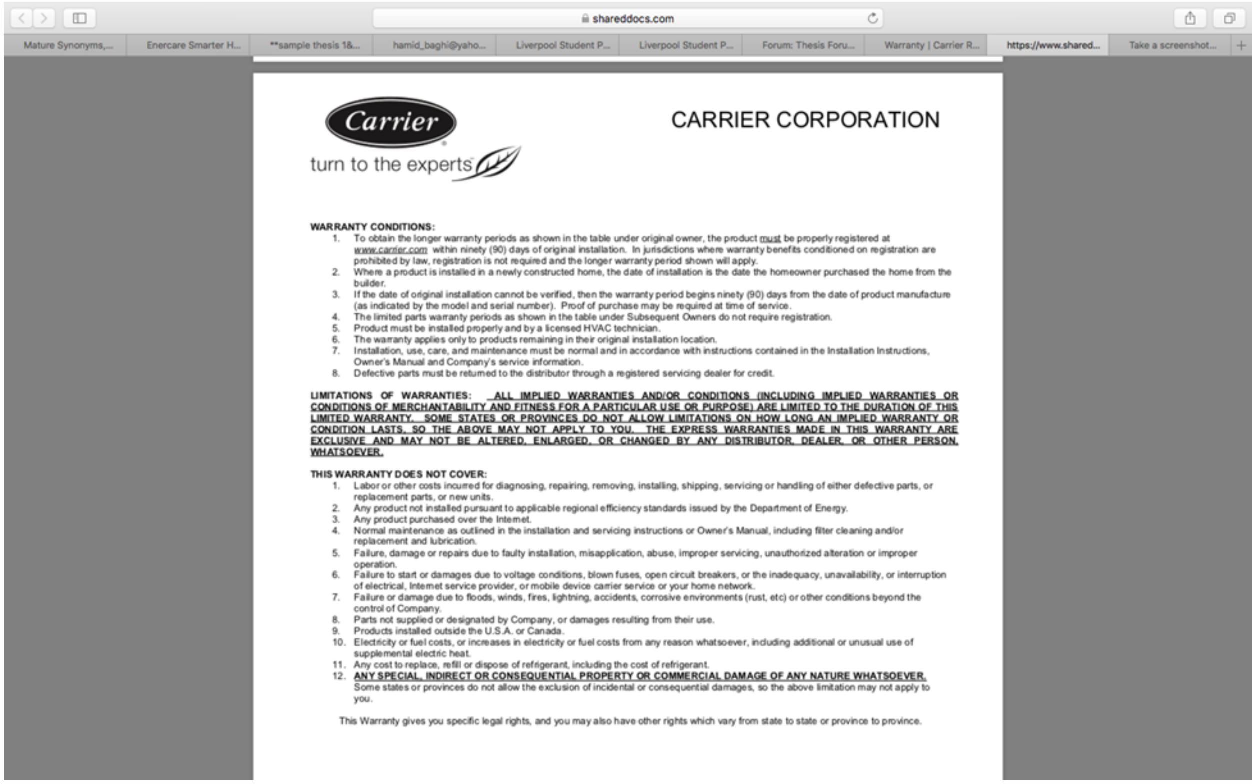
RESIDENTIAL APPLICATIONS
This warranty is to the original purchasing owner and subsequent owners only to the extent and as stated in the Warranty Conditions and below. The limited warranty period in years, depending on the part and the claimant, is as shown in the table below.

		Limited Warranty (Years)	
Product	Item	Original Owner	Subsequent Owners
Air Conditioner or Heat Pump Condensing Unit	Parts	10* (or 5)	5
	Compressor	10* (or 5)	5

* If properly registered within 90 days of original installation, otherwise 5 years (except in California and Quebec and other jurisdictions that prohibit warranty benefits conditioned on registration). See Warranty Conditions below.

OTHER APPLICATIONS
The warranty period is five (5) years on the compressor, and one (1) year on all other parts. The warranty is to the original owner only and is not available for subsequent owners.

LEGAL REMEDIES - The owner <u>must</u> notify the Company in writing, by certified or registered letter to Carrier Corporation, Warranty Claims, P.O. Box 4808, Syracuse, New York 13221, of any defect or complaint with the product, stating the defect or complaint and a specific request for repair, replacement, or other correction of the product under warranty, mailed at least thirty (30) days before pursuing any legal rights or remedies.



CARRIER CORPORATION

WARRANTY CONDITIONS:

1. To obtain the longer warranty periods as shown in the table under original owner, the product must be properly registered at www.carrier.com within ninety (90) days of original installation. In jurisdictions where warranty benefits conditioned on registration are prohibited by law, registration is not required and the longer warranty period shown will apply.
2. Where a product is installed in a newly constructed home, the date of installation is the date the homeowner purchased the home from the builder.
3. If the date of original installation cannot be verified, then the warranty period begins ninety (90) days from the date of product manufacture (as indicated by the model and serial number). Proof of purchase may be required at time of service.
4. The limited parts warranty periods as shown in the table under Subsequent Owners do not require registration.
5. Product must be installed properly and by a licensed HVAC technician.
6. The warranty applies only to products remaining in their original installation location.
7. Installation, use, care, and maintenance must be normal and in accordance with instructions contained in the Installation Instructions, Owner's Manual and Company's service information.
8. Defective parts must be returned to the distributor through a registered servicing dealer for credit.

LIMITATIONS OF WARRANTIES: **ALL IMPLIED WARRANTIES AND/OR CONDITIONS (INCLUDING IMPLIED WARRANTIES OR CONDITIONS OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR USE OR PURPOSE) ARE LIMITED TO THE DURATION OF THIS LIMITED WARRANTY. SOME STATES OR PROVINCES DO NOT ALLOW LIMITATIONS ON HOW LONG AN IMPLIED WARRANTY OR CONDITION LASTS, SO THE ABOVE MAY NOT APPLY TO YOU. THE EXPRESS WARRANTIES MADE IN THIS WARRANTY ARE EXCLUSIVE AND MAY NOT BE ALTERED, ENLARGED, OR CHANGED BY ANY DISTRIBUTOR, DEALER, OR OTHER PERSON, WHATSOEVER.**

THIS WARRANTY DOES NOT COVER:

1. Labor or other costs incurred for diagnosing, repairing, removing, installing, shipping, servicing or handling of either defective parts, or replacement parts, or new units.
2. Any product not installed pursuant to applicable regional efficiency standards issued by the Department of Energy.
3. Any product purchased over the Internet.
4. Normal maintenance as outlined in the installation and servicing instructions or Owner's Manual, including filter cleaning and/or replacement and lubrication.
5. Failure, damage or repairs due to faulty installation, misapplication, abuse, improper servicing, unauthorized alteration or improper operation.
6. Failure to start or damages due to voltage conditions, blown fuses, open circuit breakers, or the inadequacy, unavailability, or interruption of electrical, Internet service provider, or mobile device carrier service or your home network.
7. Failure or damage due to floods, winds, fires, lightning, accidents, corrosive environments (rust, etc) or other conditions beyond the control of Company.
8. Parts not supplied or designated by Company, or damages resulting from their use.
9. Products installed outside the U.S.A. or Canada.
10. Electricity or fuel costs, or increases in electricity or fuel costs from any reason whatsoever, including additional or unusual use of supplemental electric heat.
11. Any cost to replace, refill or dispose of refrigerant, including the cost of refrigerant.
12. **ANY SPECIAL, INDIRECT OR CONSEQUENTIAL PROPERTY OR COMMERCIAL DAMAGE OF ANY NATURE WHATSOEVER.** Some states or provinces do not allow the exclusion of incidental or consequential damages, so the above limitation may not apply to you.

This Warranty gives you specific legal rights, and you may also have other rights which vary from state to state or province to province.

Appendix L: Consent for Undertaking Research

HAMID KOSHKEBAGHI,
SALES MANAGER, BENG, EMC
ONTARIO, CANADA,
Nov 14th 2018

JEFF SCHWARTZ,
SENIOR SALE EXECUTIVE,
ENERCARE COMPANY,
ONTARIO, CANADA.

CONSENT TO CARRY OUT THE ACTION RESEARCH IN ENERCARE

I have been undertaking a Doctorate course in Business Administration at the University of Liverpool. I have been pursuing the course to improve my skills and knowledge in carry out research within the business field. The course allowed me to improve my understanding and skills in Action Research thus allowing me to obtain solutions to challenging in practice and issues.

The completion of the program is linked to a Doctoral thesis that is accompanied by a project in an organization, which results into key benefits for the firm.

To achieve this last part of the course, I would like to obtain a formal clearance to begin the research from the Ethics Committee. As part of clearance, the committee expects me to obtain authorization from Enercare to access the company's information, employees, as well as the facility as it may deem significant for the Action Research.

In obtaining this formal authorization to start the study, I appreciate company's Board of directors for their support. Besides, I would like to thank the company for the permission to place my knowledge and experienced gained in the course to practice. The DBA research project I seek to pursue is linked to developing a negotiation conceptual model for the Enercare Company. The implication of the research is to help the Enercare sales reps improve their performances and sales thus enhancing the company's sustainability. The research involves a continuous application of planning, adoption, and analysis to help the firm solve key issues relating to sales improvement.

I am looking forwards for a positive feedback from you to help me obtain an Ethical Approval from the Board.

Yours Sincerely
Hamid Koshkebaghi
Sales Manager, EMC, BEng, MBA,

Appendix M: Action research plan

Timeline: March-April 2019

Main Activities: Action Cycle 1 – Construction

Objectives: To plan the research process within a maximum of 18 months.

Core Activities:

Ethical Approval – The ethical approval was linked to the codes of conduct of Energycare. The code establishes policies, which protect and guide the employees. Also, it was ensured that the action research served the interest of the team as well as treating all people equally.

Informed Consent – The informed consent was designed and was required to be signed by all participants who took part in the study.

Journaling – The process was carried out during the entirety of the research. The Schein model was used, which included reacting, judging, and observing, as well as intervening. Additionally, it included the way in which these aspects affected the process of the research.

Timeline: May-June 2019

Main Activities: Action Cycle 2 – Planning

Objectives:

- To obtain key articles from various academic sources linked to the subject of discussion.
- To identify the frameworks for gathering key data.

Core Activities:

Critical Literature Review – In this part, I focused on establishing the theories and literature linked to the topic of discussion. This involved carrying out a comprehensive evaluation of the recent contributions on the most effective negotiation approaches for the salespeople.

Reframing My Plan – My planning process involved reframing the research scope with respect to my literature mapping, designing the research approach, and collecting relevant data.

Timeline: July-August 2019

Main Activities: Action Cycle 3 – Taking Action

Objectives:

- To identify the study participants.
- Interviewing and providing questionnaires.

Core Activities:

Survey Methodology and Analysis – Examining the literature and preparing the questionnaires to obtain data from the research participants.

Focus Group – The focus group involved six groups including the operations manager, experience field, supervisors, and service manager, among others. I was in charge of facilitating the focus group including all the activities during the meetings.

Case Study Interviews – The interviews were administered to 72 individuals including 12 senior agents, 12 junior agents, 6 sales managers, 2 district managers, 20 employees, and 20 consumers.

Data Gathering Process – The tools used in gathering data incorporated the interviews and the focus group. The interviews took narrative forms.

Coding and Analysis – Before being fed into the statistical analysis tool, the data was coded using the open and atlas.tiapproaches (Appendix R). The coding involved identifying relevant case contexts.

Timeline: September-November 2019 **Main Activities:** Action Cycle 4 – Evaluation Action **Objectives:** ● To gather information. ● To test the data using the research frameworks identified. **Core Activities:** Taking Action – The observation process involved documenting the impacts of the action. The action research enabled a more extensive range of information to be dissected, including yet not restricted to interviews, organization reports, direct perception, and secondary information.
Timeline: November 2019 **Main Activities:** Reviews, action, and writing the report. **Objectives:** To examine the trends within the data using SPSS and Excel research tools. **Core Activities:** Evaluation and conclusion.

Appendix N

Personal Details Name: Address: Province: The number of House Occupants:	**Response**
Are the HVAC services you have satisfying the earlier needs you had before acquiring them?	Yes () No () If No, briefly explain why: ________
How often do you need HVAC maintenance services?	3 Months () 6 Months () Annually ()
Have you ever had a bad experience with HVAC appliances? Kindly, share _____	Please Explain:
Do you think the price you are paying for the services is justified?	Please Explain:
What modifications do you think would completely change your experiences?	Please Explain:
What if we told you we have some solutions for you? Would you give us a chance?	Please Explain:

Do you have imbalanced temperature in your house? Where? and what is the temperature difference?	Please Explain:
How much is your energy bill in winter and summer?	Please Explain:
Are you familiar with rebate and incentive programs of the government to improve the efficiency of your home? And have you applied for any of them so far?	Please Explain:
How is the indoor air quality of the house? How comfortable it is? Humidity? Air purification? Does anyone in the house have allergies and/or Asthma?	Please Explain:
How safe is your house? How important do you think the safety of your gas burning equipment is to you? How can the licensed technicians of our company help?	Please Explain:
Do you think our low monthly rental equipment which includes maintenance and a warranty can help you and your family financially? By not worrying about the initial investment of paying for the equipment in advance and paying extra money for protection plans and warranties.	Please Explain:

Appendix O: Focus Group

SAMPLE FOCUS GROUP	
QUESTIONS	**ANSWERS**
Today's topic is Negotiation Strategy. Is it a good strategy for Enercare?	YES, that is what we should focus on as important topic to improve
When, and where do you use Negotiation?	During marketing and in the sales and marketing department.
What do you like best about Enercare products?	Quality, value, service, size of company, professional installation, professional technicians and being ethical company.
What are your problems or concerns about Enercare products?	Short and sweet, higher prices of equipment
When looking for Enercare products, what company or brand first comes to mind?	Enercare is a very old company that was named Enbridge, consumer Gas and Direct Energy before and now is called Enercare
What features do you think are better in Enercare competitor's product?	\none, just cheaper price but their service is not as good as Enercare at all
What changes would you recommend making to Enercare product to give it an edge over its competitors?	Pricing and quality service delivery, and training our sales agents to have better understanding from the products and negotiate with customers consciously
What are specific issues, concerns, or problems you've faced when using Enercare product?	I had no issue at all. Our team of installation and services are great
What is something that has deterred you or would deter you from using Enercare product?	The prices of Enercare product are expensive

Appendix P: Interview

Q No	Interview Question	Answer
Q1	Do you consider yourself part of Enercare's success?	**Yes**
Q2	Can you provide your role within the company?	**Yes, I am in charge of 12 sales agent in GTA east**
Q3	Can you provide an idea of your initial negotiation process?	**Sales Agent negotiate with customers not me.**
Q4	How has the company's culture influenced the negotiation style?	**The company tries to help improve the sales volume with all tools and strategies possible, but I am not sure if was successful so far**
Q5	What role do you play in the company's negotiation process?	**District Sale Manager**
Q6	Have you thought of new ways of obtaining increased negotiations?	**Not seriously, but we chat about different pitfalls of company sales strategies with peers and agents a lot**
Q7	How do you promote a win-win situation?	**Better price, professional jobs and service for customers and mor sales volume.**
Q8	How do you handle difficult negotiations?	**Our sale agents try to win most of the customers but I believe they are not very successful since Enercare prices are higher that other competitions that make it very hard for them. They are doing their best.**
Q9	What experiences have you had with meeting the targeted sales?	**Depends on different seasons varies, and temperatures in summer and winter plays critical role in number of sales in company**
Q10	What do you do if you do not meet the company's targeted sales?	**It is possible, we try to catch up in next quarter and if not next year. It affects our ranking and incentives and managers might lose their jobs.**
Q11	How technology helped you in improving values in negotiation?	**Sales force and digital equipment's are helping our agents a lot in having all info have in hand, we can add different technology to improve performance.**

Appendix Q: Company and Sale Agents responsibility

Company Responsibilities:	Sales agent Responsibilities:
Hire sales agents with a technical background and preferably licensed technicians who want to work as sales agents	If sales agents lacking technical background, they should attend numerous installations with installers to increase their technical knowledge.
A company should have regular training for sales agents to familiarize them with sales techniques and technical points of new equipment.	Sales agents should attend the training courses and make sure to read and learn all the related literature and manufacture spec sheets of HVAC equipment selling.
Pair a few service technicians with each sales agent to communicate with each other's, in case technicians cannot fix the old equipment and want sales agents to offer customers new equipment.	The sales agents should be in touch with technicians and keep visiting them inside and outside of fields on a regular basis.
Have all the tools ready and in working condition for sales agents to use in a sales presentation, like CRM, Computer, phone, financing tools and so on and so forth	The sales agent should apply all the tools to offer the best service and use them in better negotiation with the customer

Have enough crew to support sales agents in the sale process.	Send the information correctly and on time to process the deal flawlessly in minimum time.
Have a service desk and customer service available in case sales agents have any technical and not technical questions.	Ask a question if have any ambiguity about any product and services.
Create several different meetings to introduce staff and technicians to sale agents	Sales agents should have a great connection with all staff to know whom and where to refer to any potential issue to raise sales presentations.
Do not exhaust the sales agents with not related issues and drain them psychologically.	Stay positive and make sure rapidly clear their minds if any problem arises.
Help to boost the confidence of sales agents with their recognitions.	Remain confident and always try to be the winner
Influence the sales agents to be positive with some energizers and spiffs	Remain positive and know it is a critical factor for success
Train the sales agents on how to ask for customers to deal with several points of negotiation (Training).	Not to be shy and find any opportunities to ask for customer deal.

Prepare sales agents adequate and professional catalogs literature	Show the literature to the customer and make sure they understood what is buying
Give them tools required in presentation and measuring the ducts and airflow equipment to do heat loss calculation.	Use the tools and perform the required calculations before any design and offering a quotation.
Create combo deals and offer sales promo and incentives on a regular basis to allow sales agents to present more value for money.	Sale agent should explain customers the amount of saving if take advantage of existing deals.
Make sure the infrastructures for customer eligibility for government rebates are available to offer.	Process the government rebates and book customers the required audits to be eligible for rebates.
Invite energy auditors to inform and update sales agents about the rebate programs available.	Make sure to understand them to bundle the eligible equipment to decrease the net price of equipment.
It is much better to have an in-house Energy auditor available to perform audits on time.	Sales agents can include the Audit fee in rental or sales price of equipment and not charge them separately.
Provide the sales agents shirts, booty, pens, folders, catalogs even cars with the company's logo to look very professional.	Sales agents should always use them and have ID available to show customers on customer doorstep.

Minimize the gap between the company and sales agents with all the staff and departments in a quick call or email.	To adapt teamwork and let the customer feel that is dealing with the whole team of Company, not just the individual sale person.
Impose a matching price policy for sale agents to maneuver.	The sales agent should give customers peace of mind that can match the price for the same equipment and services to revive the lost customers.
Might offer some extra discount for customers who are comparing the coemption quotations.	Sales agent to follow up and present the next offer to win back customers.
Have comprehensive marketing and advertisement and create more leads for agents.	Not to select and choose customers and never quote customers over the phone. Make sure to run all the leads and do not waste any potential customers.
Have all the equipment in stock for installation.	Offer the next day installations if the customer commits on a deal for the first time visit.

Update the monthly deals and promotions on the web site of the company.	Offer the deals and promotions in each sales presentation and refer customers to website deadlines.
Send some surveys right after-sales presentations or installations, ask some questions to measure the performance of agents and installers.	Agents should follow the perfect visit presentation book and make sure all the questions and concerns of customers are addressed.
Have some ancillaries like; duct cleaning, humidifiers, and air purifies included in some combo deals.	Use free ancillaries as negotiation techniques to offer customers.
Provide some specific deals for existing customers like protection plan discounts and customer loyalty discounts.	Make sure to evaluate if the customers are eligible for such discounts before arrival to the customer house.
Have rental, financing and deferral payments available to offer customer for different payment option	Allow customer knows the financing options
Have different methods of payment especially for customers who want to pay by Credit cards	Accept the cheques and be able to preauthorize the credit card payments

Pay good incentives and commissions to reward sales agents to win customers	Apply all the techniques and do their bests to win the customers deal and enjoy the rewards
Set some practical and realistic goals for sales agents and support them to reach their goals.	Push themselves to hit the target and improve their performances systematically.

Appendix R: Results from Data Analysis

Statistical Tool Result

Topic	Theme	1A	1B	1C	1D	1E	1F	1G
SYSTEMATIC PRESENTATION	Team involvement	I am working for Enercare for 15 years and not planning to leave this company	I used to work for another company and was not happy	I am really enjoying working with a team of Enercare	It is good to work with this company, but some strategies are not healthy	I am pleased working with Enercare, but I also think about other companies as well	Very happy but I think managers can improve the situation for more income	It is ok to work for Enercare but most of the corporations have their own issues. In general, it is fine.

Topic	Theme	1A	1B	1C	1D	1E	1F	1G
SYSTEMATIC PRESENTATION	Lead preferences	I definitely just run the tech lead	I do not care for marketing lead when I am busy	I am always busy with tech leads and try avoiding the marketing ones	It is hard to run both at the same time, but tech lead customers are serious but marketing not really	Both of them are important for me but tech leads are prioritized	I try to call the marketing leads and reschedule to another time if have another tech lead same time	Both are important for me bit-tech leads are of-course more urgent.

Topic	Theme	1A	1B	1C	1D	1E	1F	1G
SYSTEMATIC PRESENTATION	Quotation Over the phone	I am not even interested in marketing leads when I am busy and try to skip them	Yes, most of the times I qualify them over the phone and give them a price on the phone	I qualify them but not give them a price over the phone. I try to make another appointment	All customers are important I try to low ball them in the phone and then make another appointment to visit them later	Most of the time I call my marketing leads and if they ask for the price, I give them a range over the phone	I call them but not give them any price	It is hard to say, it depends on the customer but if I notice it is wasting time, I call and quote them over the phone

Topic	Theme	1A	1B	1C	1D	1E	1F	1G
SYSTEMATIC PRESENTATION	**Standard Presentation book**	Not at all	I do not think so There are lots of points missing	I always explain a lot more from my own slides to customers	I never use the Enercare presentation book. I do not have it at all	It is a joke, I never use it. I do not have it.	I use it but is not complete enough	Sometimes I use them but not always.
	Does it cover all subjects?	Not at all	Not really	It is ok but I add more	No	It needs to be updated, not good enough	Never	I think is ok
	How pictures and videos can help you?	Strongly helpful	Good to have pictures and video to show customers	Pictures can explain the points to customers	Very helpful and important	Make no difference.	Very helpful and efficient	It helped me a lot in the presentation

Topic	Theme	2A	2B	2C	2D	2E	2F
Value propositioning	**How important is Value propositioning?**	I can only sell the product by adding values and install qualities	I am pretty sure it can help me to close deals	It is very important to justify the higher prices	That is the reason for Enercare high prices. We add value with higher quality and top-notch standards	Very important	If our sales agents do not inform customers about values, we lose the business
	What do you recommend adding value?	Top-quality installations Several divisions under one operation for all customer needs	Q & A inspections	Good customer service, great installations and knowledgeable technicians	Enercare financing, customer service, install team, best quality	High-quality install, Hi-tech services,	Having several divisions like plumbing, electrical, securities, and IT solutions

Topic	Theme	2A	2B	2C	2D	2E	2F
Value propositioning	**Higher list price and closing ratio**	Our prices are almost double comparing to small companies	I only lose customers because of price, otherwise, customers love to buy from Enercare	Our price is high, and we can barely compete	Price is not issued for me I always sell the company	I do my best to avoid the price issue with value-adding	I wish Enercare could adjust the prices at least 20%, our list price is very high

Topic	Theme	2A	2B	2C	2D	2E	2F
Value propositioning	**How Enercare can compete with value-adding and how is now?**	Our existing strategies in value propositioning are not helpful and not helping me a lot	Enercare has the same promo almost same season and is keep repetitive	Enercare can do a much better job in value propositioning but not doing anything extraordinary in the last 8 years I am working here	I think is not good enough	The promos are ok, but all the competitions have the same promos always	We should be more aggressive in value-adding and differentiate ourselves with competitions

Topic	Theme	3A	3B	3C	3D	3E	3F	3G
No Money, No worry	**How do you promote Win-Win Negotiation?**	I try to make sure they get what they want	Adding value and give them a discount in price	I try to convince them that they are getting the best value for their money, without hurting my margin of benefit	It is hard to do it in Enercare, I was ok when I was working for a smaller company	I work on a price and give my customer lots of discounts but most of the time does not work.	I try to help them to choose the best product and educating them with the best solutions	It is very hard for me to do that, I wish I could offer them a better price
	How the Company can help in Value propositioning?	Better prices, better services	Offering them unique products	Keep the quality of install with better price	I always have a challenge with justifying the price with customers	Best quality, service lower price	Give them the best solutions, and better customer service	The higher quality of course and better method of payments, lower payments

Topic	Theme	3A	3B	3C	3D	3E	3F	3G
No Money, No worry	**How the company can help in negotiation?**	It can help in price, the flexibility of install, offering new products	Offering better services and cheaper prices	Try to be competitive with price, and support agents with admin help	Never stop new offers and promos and keep adding new services	I just need better prices the rest is ok with me	I want to be competitive.	I am proud of our services and job quality but have a hard time to justify the price

Topic	Theme	3A	3B	3C	3D	3E	3F	3G
No Money, No worry	**How do you meet your goals and targets?**	I try hard to meet my targets but sometimes is hard	My target goal is less than my sale revenue in the previous company, but I guess is normal in Enercare	Meeting the manager's target is tough but doable	It is ok, but if we could work better on sales price, I personally had a 20% increase.	I am always behind of my target but that is normal here	Our targets in Enercare comparing to prices are not reasonable	I do my best to achieve my goals with mostly tech leads not marketing one

Topic	Theme	1A	1B	1C	1D	1E	1F	1G
SYSTEMATIC PRESENTATION	**Enercare standard sale strategy and training**	Enercare has not adopted key a strategy in sales at all and just train agents with CRM system	The sale strategy of Enercare is not homogenous and managers rely on agent knowledge and talent mostly	I had a few pieces of training a few years ago but none of them were about negotiation and sales presentation	I had a couple of weeks ride along with other sales agents at the beginning and some basic information for training	I think the training comparing to other companies is ok	I was coming from the install department. They hired me as the sales agent and had no training in the sale and just provided me basic literature	The training was minimal, and I never had any standard presentation book to follow.

Topic	Theme	1A	1B	1C	1D	1E	1F	1G
SYSTEMATIC PRESENTATION	**How important is training**	It can help to be familiar with sales strategies and at least know what the company wants from sales agent to do	Training is very important but should be aimful and along the company's strategies in value propositioning	I had no training at all, and I was lost for the first few months of my job	I had two weeks of training that was very general, and the trainer was the motivational trainer.	This job is technical, and our sale strategies should be according to the content otherwise training is useless	Training is very important and critical in the success of employees, particularly at the beginning of your job	I had very short and shallow training at the beginning and a complementary course in the next training was ok.

Topic	Theme	2A	2B	2C	2D	2E	2F
Value propositioning	**Why agents should create value?**	If we do not add value, we cannot sell our products	It is very simple; we need to add values to justify our higher prices	Value propositioning is part of presentation and sales strategies	To increase profit and make it win-win for both Enercare and customer	It is an insuperable strategy of sales.to be successful we have to.	It necessary but it should fit the competencies of the company otherwise is not very effective

Topic	Theme	2A	2B	2C	2D	2E	2F
Value propositioning	**How adding value help in the sales presentation**	Customers should trust agents otherwise never buy from us. Value-adding should be step by step in the sales presentation process	A great presentation can help decision-makers to finalize the deal on spot and make the decision on their purchase fast	It is very important to add value in the sales presentation otherwise everyone can sell their products even on the phone	That is the whole purpose of sale presentation, but we need to offer valuable and unique products that others cannot compete with.	It should be according to competencies of the company, otherwise cannot be valuable	It is very critical to win customer trust and ask for a commitment to purchase

Topic	Theme	3A	3B	3C	3D	3E	3F	3G
No Money, No worry	**How different layers of Enercare can help in the negotiation of agents?**	Financing Department with lower interest rates and a longer period of payments	Better customer service and proper communication of all units	Minimize the politics and lengthy process of some paper works like installation finalization	A better process, affordable monthly payments and introducing great packages of equipment	Rapid install, great maintenance, licensed technicians and reliable equipment	Offering a valuable product with less expensive prices	Facilitate the rebates and provide affordable prices for customer with urgency and special needs