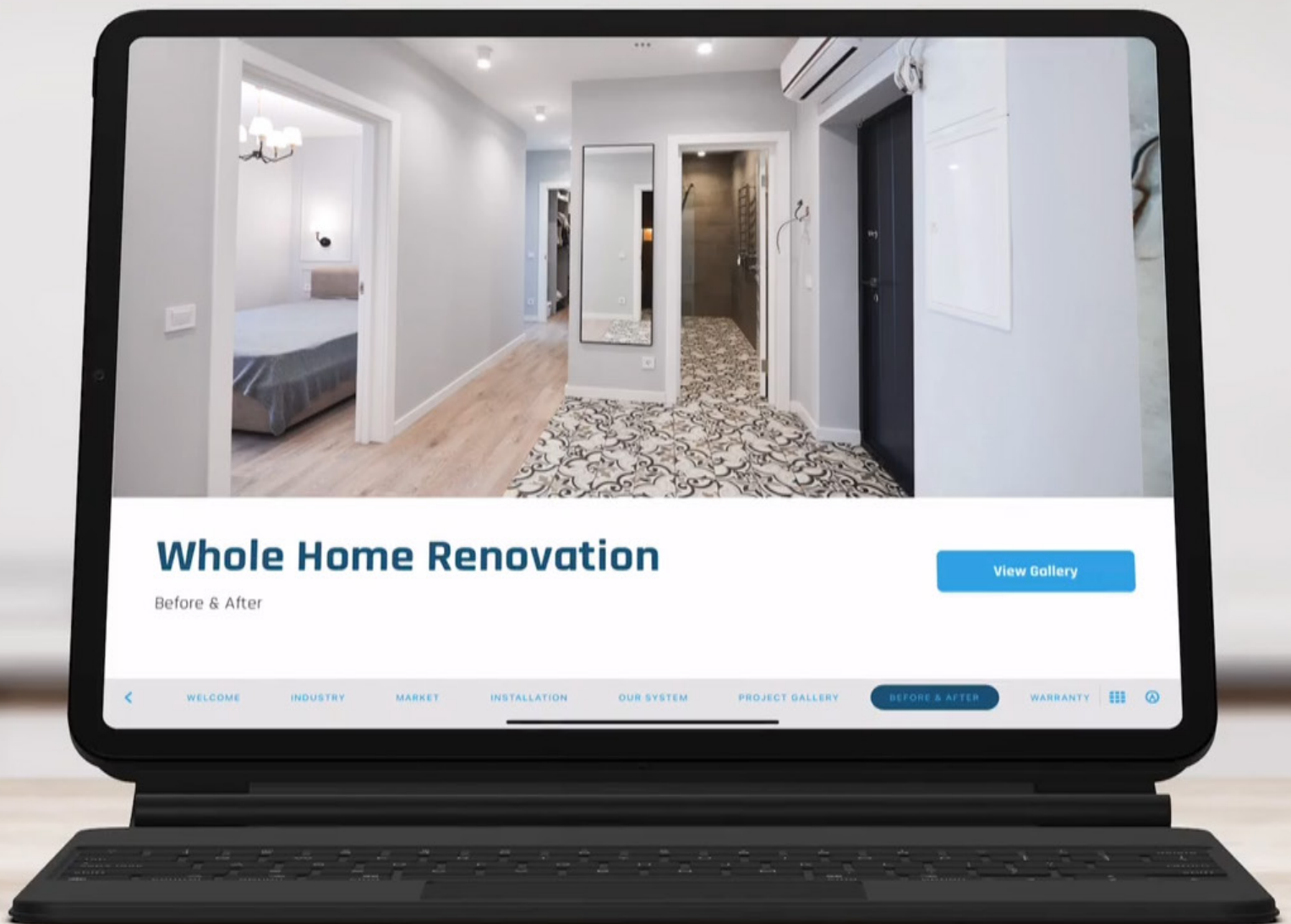


# How to Make a Great Presentation:

A practical playbook for home remodeling and home services sales teams to win more deals with clarity, consistency, and confidence





In today's home improvement market, the company that wins is the one that delivers the best customer experience during the in-home presentation. Homeowners often start the process overwhelmed with options, skeptical of promises, and quick to tune out anything that feels generic or confusing. The companies that succeed address that uncertainty head-on – guiding the homeowner through a clear, confident process that makes the value of the solution easy to understand. In that environment, the presentation isn't just a "nice-to-have." It's the cornerstone of the experience and the moment when confidence in the solution is built through confidence in the process.

This eBook is built for contractors with ambitious sales teams, looking to grow and build a repeatable, scalable sales process. A great presentation isn't about flashy slides or gimmicky animations. It's about structure, pacing, and a replicable story that your team can deliver consistently, whether it's in the home, on a screen, or shared after the appointment.

Inside, you'll learn how to build presentations that connect early, educate clearly, handle objections without friction, and guide homeowners to a decision without overwhelming them or dragging the appointment out.

If you're serious about **winning more deals, increasing close rates, and building a sales process your team can execute consistently**, day after day, this is your playbook.



## What You'll Find Inside

Ingage has compiled practical frameworks and ready-to-use tools to help you take action – not just take notes. Inside, you'll find:

- A clear structure for a modern in-home sales presentation, built for repeatable success
- A storytelling framework that keeps homeowners engaged and focused
- A “Do Less, Do It Better” checklist to eliminate the content that’s hurting your close rate
- Design rules that improve clarity and credibility without slowing your team down
- A rollout plan to get veteran reps bought in and new reps ramped faster



Use this eBook in two ways:

- 1. As a presentation rebuild:**  
Start at the structure section, then replace one part of your current deck each week.
- 2. As a sales team standard:** Pick one presentation flow, train to it, and reinforce it in weekly sales meetings until it becomes muscle memory.

**Lead With Clarity.**

**Present With Confidence.**



## Section 1:

# The Contractor Presentation Reality Check

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Most contractors don't lose deals because their offering isn't good. They lose because the homeowner leaves the appointment without clarity or confidence – unsure what they're buying, unsure why it costs what it costs, and unsure what happens next.

That uncertainty is expensive. It creates delays, invites more bids, and turns your sales process into a “follow-up chase” instead of a guided decision with a higher likelihood of ending with a commitment.

A great presentation fixes that, but not by adding more pages, more awards, or more technical detail. A great presentation creates clarity fast, builds confidence in the homeowner's decision and the solution being offered, and makes your value easy for every rep to deliver consistently.

In this section, we'll unpack what's changed about how homeowners evaluate contractors and why the companies that modernize their presentations – without overcomplicating them – are the ones that win.



## Chapter 1:

# Why Great Presentations Win (Even When You're Not the Lowest Bid)

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## The first moments decide whether you earn attention

Your presentation has a very small window to connect. If you don't establish relevance quickly, you spend the rest of the appointment trying to win back attention you already lost. One of the simplest advantages you can build into your sales process is a strong opening that immediately frames: what we're doing today, why it matters, and how we'll get to a decision.

## Homeowners don't want a pitch – they want certainty

Most homeowners aren't really buying a roof, replacement windows, or new siding. They're buying the outcome those things create.

They're buying water not dripping on their head while they sleep.

They're buying a lower electric bill every month.


They're buying a home without drafts in the winter.

In other words, they're buying peace of mind, comfort, and predictability in their home.

Once homeowners understand the outcome, what they're really deciding is whether they feel confident moving forward with you. They're looking for:

- Confidence they're choosing the right solution
- Confidence the installation won't become a nightmare
- Confidence the price makes sense for what they're getting
- Confidence the company will stand behind the work





That's why the best presentations do three things consistently:

1. Connect to the homeowner's real problem
2. Show a clear, understandable solution
3. Prove the value in a way that feels credible and trustworthy

When those three elements work together, it's easier for the homeowner to say yes, because they can explain the decision to themselves (and their spouse) without replaying a two-hour conversation.

## The biggest mistake: trying to prove everything

When contractors feel pressure to “sound like experts,” they often oversell; too many claims, too many options, too much detail. The result is predictable: the homeowner gets overwhelmed, stops listening, and defaults to “we need to think about it.” Teams try to include everything they know, and it becomes too much for a 20-minute conversation. The fix is prioritization: define your key points, limit what you cover in the moment, and keep the rest as optional depth.

### Quick diagnostic: are you overwhelming homeowners?

If your reps regularly hear these phrases, your presentation is probably doing too much:

- “Can you send this to us?” (because they didn't understand it live)
- “We need to look it over” (because the decision is still unclear)
- “We're still getting a couple quotes” (because differentiation didn't land)



## Chapter 2:

# The New Standard: Digital, Interactive, and Built for Follow-Up

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## Static presentations create a follow-up problem

A printed binder or static PDF can work, but it carries a risk: it can't adapt to the homeowner's priorities, and it can't easily support the conversation when objections pop up. Digital presentations solve that by being more visual, more flexible, and easier for homeowners to revisit on their own time. This is exactly what Ingage was built for: contractor teams that need a modern, structured presentation they can run, share, and improve without rebuilding from scratch.

## Modern presentation tools changed what “good” looks like

Sales presentations have evolved beyond static pages. Today's tools make it easier to:

- **Personalize without starting over** (use a core deck and adjust details for each prospect)
- **Keep everyone using the latest version** (so every rep presents the same offer and message)
- **Make presentations more engaging** (video, visuals, and flexible navigation)
- **See what homeowners interact with** (so follow-up is more focused and relevant)

## Interactivity isn't “flash”— it's a clarity tool

The best use of interactivity is simple: keep the presentation clean while still providing depth when the homeowner asks for it. Tap-to-reveal details, embedded proof, and navigation buttons reduce clutter and keep the conversation moving, without forcing reps to scroll through irrelevant content.



## A repeatable structure beats “winging it”

In home improvement, sales teams are a mix of veterans and newer reps--turnover is real. Structure is what creates consistency across that mix. When the flow is clear, reps don't need charisma to succeed; they need a reliable process. Structure creates repeatable success, and confidence becomes contagious: confident reps help homeowners feel confident about the decision.

## What a modern presentation must do

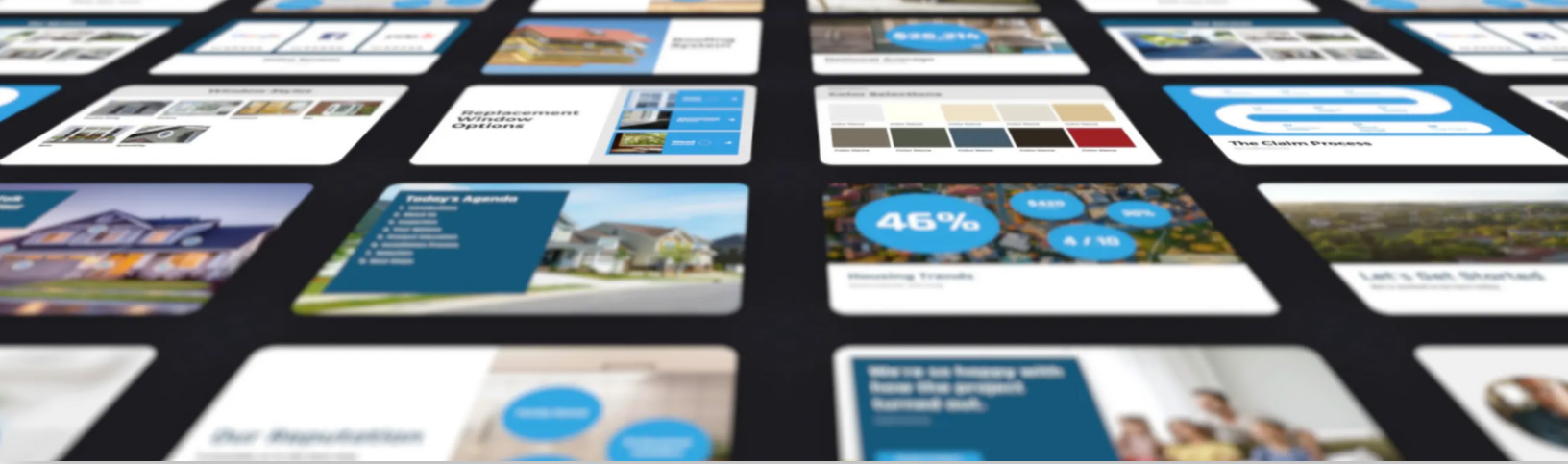
A strong sales presentation should:

- Make the homeowner feel understood early
- Guide the conversation in a logical order
- Use visuals to reduce explanation time
- Anticipate objections and address them cleanly
- End with clear next steps (not a vague “let us know”)



Next, we'll get practical: how to build a presentation that's easy to deliver, easy to customize, and built to close, without adding hours of prep time or turning your reps into designers.





## Section 2:

# Build the Presentation Homeowners Say “Yes” To

If Section 1 explained why presentations win, this section is about building one your team can run consistently.

The goal isn't to create a prettier deck. The goal is to create a presentation that:

- Earns trust early
- Makes the homeowner feel understood
- Keeps the conversation moving in a clear order
- Lands on a decision with next steps that feel natural

That's the difference between “a lot of information” and a guided buying experience.

Most contractor presentations break down in one of two places:

1. **They don't feel personal** – the homeowner can't see themselves in it.
2. **They don't feel structured** – the sales rep jumps around, overshares, or goes too deep too fast.

The fix is a simple formula: **know the audience, tell the story, structure the presentation.** When those three are right, everything else (visuals, proof, interactivity, delivery) becomes easier and far more persuasive.



## Chapter 3:

# Know Your Audience (Homeowner + Household Decision Team)

## You're rarely selling to one person

Even when one homeowner is in the appointment, the decision usually isn't made in the room by one individual. It's made later, after the conversation is repeated, interpreted, and compared to other contractors.

That means your presentation has two audiences:

- The homeowner in front of you
- The people who will hear about it later (spouse/partner, family, sometimes a neighbor or friend)



If your presentation can't be repeated clearly, you're inviting confusion, and confusion delays decisions.

## The key rule: make the homeowner the hero

Your company is *not* the main character. The homeowner is. Your role is the guide with the plan. That framing shifts your presentation from “look at us” to “here's how you get what you want.”



# Story Spine Template

Their goal is:

The risk/problem is:

Our recommendation is:

The process will look like:

The proof is:

The decision path is: (options + next step)



## What homeowners actually want from your presentation

They want confidence in five areas:

1. **The problem is understood** (they feel heard)
2. **The solution makes sense** (they understand what you're recommending)
3. **The process is predictable** (they know what happens next and what to expect)
4. **The investment is justified** (the price feels anchored to value, not mystery)
5. **The contractor is trustworthy** (proof + professionalism + clarity)

When your presentation hits those five, you reduce the “we need to think about it” reflex.



## The fastest personalization is a strong recap

Before you show anything about your company, recap what you learned:

- Their goals
- What's not working today
- What they care most about (budget, timeline, quality, disruption)
- What success looks like to them

This takes two minutes and turns your presentation from about you to about the homeowner.



# Discovery-to-Deck Worksheet

Use this on every appointment. Then build your presentation around it.

Homeowner goals (top 3):

Pain points / risks they mentioned:

Decision drivers (rank): price / timeline / quality / warranty / disruption / financing

Must-haves:

Deal-breakers:

Who else is involved in the decision?

Next step they expect after today:



## Chapter 4:

# Nail the Core Narrative: Problem > Solution > Value

Homeowners don't buy information. They buy a story that makes sense.

A great presentation is a sequence that feels obvious:

- Here's what's going on
- Here's what we recommend
- Here's why this is the right choice

When reps skip the sequence—or overload it with features—homeowners don't follow. And if they don't follow, they don't decide.

## The simple narrative that closes premium projects

Use this three-part outline:

### 1. The Problem (in their words)

Show you listened. Confirm what matters.

- “You want X.”
- “You're concerned about Y.”
- “The current situation is causing Z.”

### 2. The Solution (your unique approach, not your catalog)

Explain what you're recommending and why it fits their goals.

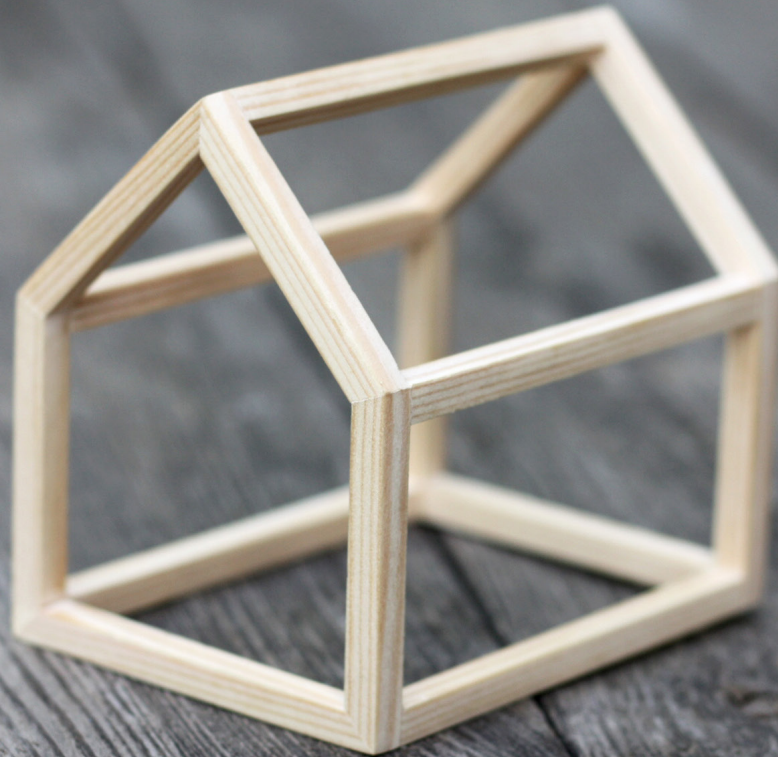
- Scope (what's included/excluded)
- Process (how you work)
- Timeline (what happens when)



### 3. The Value (proof + differentiation + confidence)

Make it clear why you're worth choosing.

- Proof (photos, reviews, warranty clarity, process reliability)
- Differentiation (what you do differently)
- Risk reduction (how you prevent surprises)



## Chapter 5:

# Structure That Keeps It Moving and Keeps You in Control

## A great structure eliminates rambling

Structure isn't about being rigid. It's about removing the need to improvise.

When reps “wing it,” three things usually happen:

- They over-explain early
- They jump around when questions come up
- They run out of time right when decision clarity matters most

A strong structure gives you the confidence to stay on track without sounding scripted.

## The recommended flow for contractor sales presentations

Use this as your baseline presentation sequence:

- 1. Set the agenda:** What we'll cover + what decision we're aiming for today.
- 2. Recap their goals:** Two minutes. Make it feel personal.
- 3. Present your recommendation:** The solution and scope, clean and clear.
- 4. Show proof and differentiation:** Job photos, process, credibility—focused on their priorities.
- 5. Review investment + options:** Show choices without creating chaos.
- 6. Handle objections and FAQs:** Planned, clean, not defensive.
- 7. Next steps:** Specific close: deposit, measurement, design retainer, schedule, follow-up.



## The “Do Less, Do It Better” principle

You don’t need 60+ pages to look professional. You need the right 12–20 pages, delivered with clarity and control, with deeper content ready if homeowners want to explore further.

Your presentation should feel like a guided tour, not a data dump.



# Winning Deck Blueprint

A simple build list your team can standardize:

Title / agenda

Homeowner recap

Recommendation overview

Process / timeline

What's included

Proof (before / after + reviews)

Warranty / service expectations

Options (good / better / best or base + upgrades)

Investment + financing (if relevant)

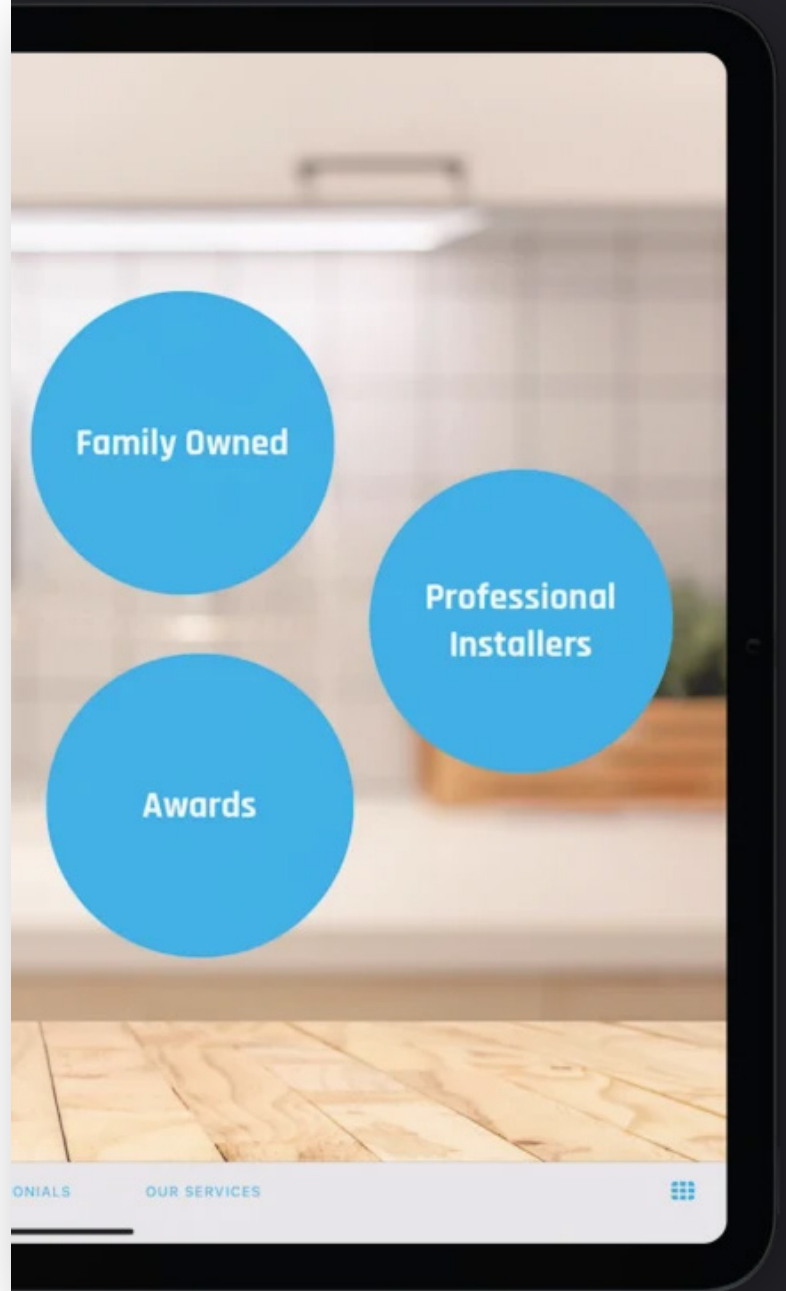
FAQs / objections

Next steps



At this point you have the foundation: audience, narrative, and structure.

Next we'll make it land: how to design and present information so homeowners absorb it quickly, using visuals, proof, and simple interactivity that strengthens clarity instead of adding complexity.



### Section 3:

# Design and Content That Actually Lands

Once you have the right audience focus, story, and structure, the next question is simple: **can homeowners absorb it quickly?**

Most contractor presentations fail here. They're packed with text, technical jargon, and "everything we do" messaging that feels impressive to the team but exhausting to the buyer. Homeowners don't want more information. They want the right information presented clearly.

This section is about making your presentation easy to follow and hard to forget. That means:

- Using visuals that do the explaining for you
- Presenting proof in a way that feels credible, not sales-y
- Adding interactivity so you can keep the deck clean while still going deeper when it matters

Done right, this is where your sales team gets faster, your message gets tighter, and your homeowners feel more confident.



## Chapter 6:

# Visuals That Sell the Work, Not Just Tell About It

## Your biggest advantage is already in your camera roll

Unlike a lot of industries, contractors have a built-in asset library: real projects. Real homes. Real transformations. The problem is most teams don't use those visuals strategically—they sprinkle them in like decoration instead of using them to drive understanding.

A strong visual doesn't just “look good.” It answers a homeowner question without requiring a long explanation:

- What will this look like?
- What's included?
- How disruptive is this?
- How do you handle the messy parts?
- How do I know this will turn out well?

## The visual hierarchy that works for homeowners

Use visuals in this order of impact:

### 1. Before/After storytelling

- Not just “here's a pretty after”
- Show the problem state > the transformation > the result

### 2. Annotated jobsite photos

- Add labels like: flashing, underlayment, venting, framing, waterproofing, protection steps
- One image can prevent ten minutes of explanation



### 3. Simple diagrams

- Process timeline
- “What happens next” steps
- Scope boundaries (what’s included vs excluded)

### 4. Product visuals with context

- Only include product shots if you connect them to a benefit the homeowner cares about

## Design rules that keep you credible

- One idea per page
- Headlines should state the point, not just name the topic
- Avoid tiny text and dense paragraphs
- Use “show, then explain” – visual first, short supporting line second



WHY NOW?

PRODUCT DEMONSTRATION

FINANCING

IN CLOSE

JUMP TO SECTION



# Visual Checklist

Every contractor presentation should include:

- 3-5 before/after examples relevant to the homeowner's project
- At least 2 annotated "under the surface" photos (the parts that reduce risk)
- A process/timeline visual
- A "what's included" visual (even if it's a simple checklist layout)
- A proof visual: review snapshot, rating summary, or warranty clarity page



## Chapter 7:

# Use Proof and Data Without Turning It Into Homework

## Proof builds trust when it's specific

Homeowners don't doubt that contractors can do the work. They doubt that the work will go smoothly, on time, and without surprises. Proof is what lowers that risk.

The mistake is using proof like a trophy case:

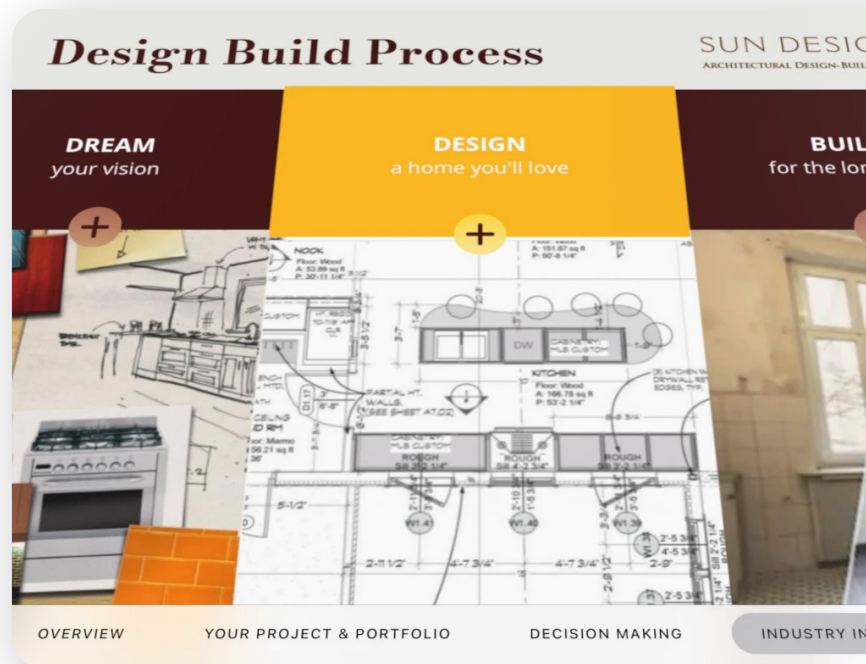
- Too many logos
- Too many badges
- Too many generic claims

Instead, proof should support the decision points homeowners care about.

## What proof matters most in home improvement

Focus on evidence that reduces uncertainty:

- **Process proof:** how you manage projects, communication, protection, cleanup
- **Quality proof:** photos, workmanship details, warranties that are actually clear
- **Social proof:** reviews, referrals, neighborhood work, short testimonials
- **Reliability proof:** responsiveness, schedule expectations, what happens if something changes



If you have real metrics like Google Review ratings, use them but keep them simple and honest:

- On-time completion rate (if you track it)
- Average project timeline range (with variables stated)
- Callback/warranty claim rate (only if reliable)
- Financing approval patterns (if relevant)

## How to present data so it helps instead of distracts

- Pick one message per data point
- Visualize it (don't bury it in text)
- Add context in plain language
- Don't overclaim – credibility beats cleverness



# Proof Library Builder

Assign someone to maintain:

- 20 best before/after examples by project type
- 10 “under the surface” craftsmanship photos with labels
- 10 short testimonials tied to common objections (timeline, mess, quality, trust)
- Warranty and service policy pages written in plain English
- A “what to expect” page for the first week of work



## Chapter 8:

# Make It Interactive (Without Making It Complicated)

## Interactivity is a clarity tool, not a gimmick

The best presentations stay focused. Interactivity lets you keep the main story simple while still jumping into details when a homeowner asks.

Think of it as a guided conversation:

- If they care about the timeline, go deeper there
- If they care about materials, show options
- If they worry about disruption, show the protection plan

Instead of forcing every homeowner through every page, you give your reps the ability to navigate confidently. *With Ingage, adding a ‘tap to reveal’ layer or branching to proof content takes minutes, not a redesign.*

## Where interactivity works best for contractors

Use it in places where homeowners naturally have questions:

### 1. Options and upgrades

- Good / Better / Best
- Base scope + add-ons
- “If budget is the concern, here are trade-offs”

### 2. Material or system comparisons

- Roofing systems, window packages, HVAC equipment tiers, finish options
- Keep comparisons homeowner-friendly: benefits, not specs



### 3. Timeline and process

- Tap-to-reveal: what happens in each phase
- What the homeowner needs to do and when

### 4. Proof on demand

- “See examples like yours”
- “What our warranty covers”
- “Reviews from similar projects”

## The simplest interactivity rule

If interactivity makes the presentation harder to deliver, it’s too much. Your reps should feel like it’s helping them stay in control, not like they’re running software.



### Client Review

When Carla saw our ad in a magazine, and she and her sister both tore the same one out to save for later, that’s how they knew calling us was meant to be.

[Watch Testimonial](#)

ABOUT

COST VS. VALUE

DOOR TYPES

GLASS & ACCESSORIES

SECURITY

GALLERY

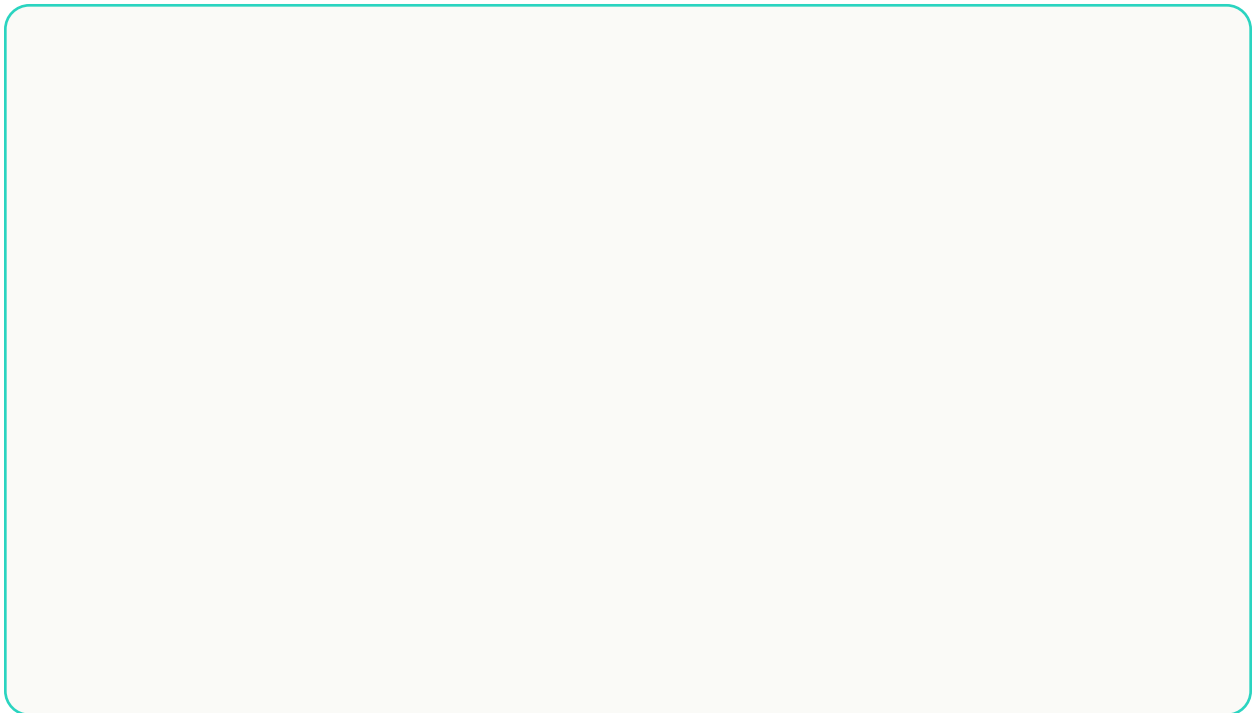


# Clean Deck/Deep Detail Map

Build your presentation in two layers:

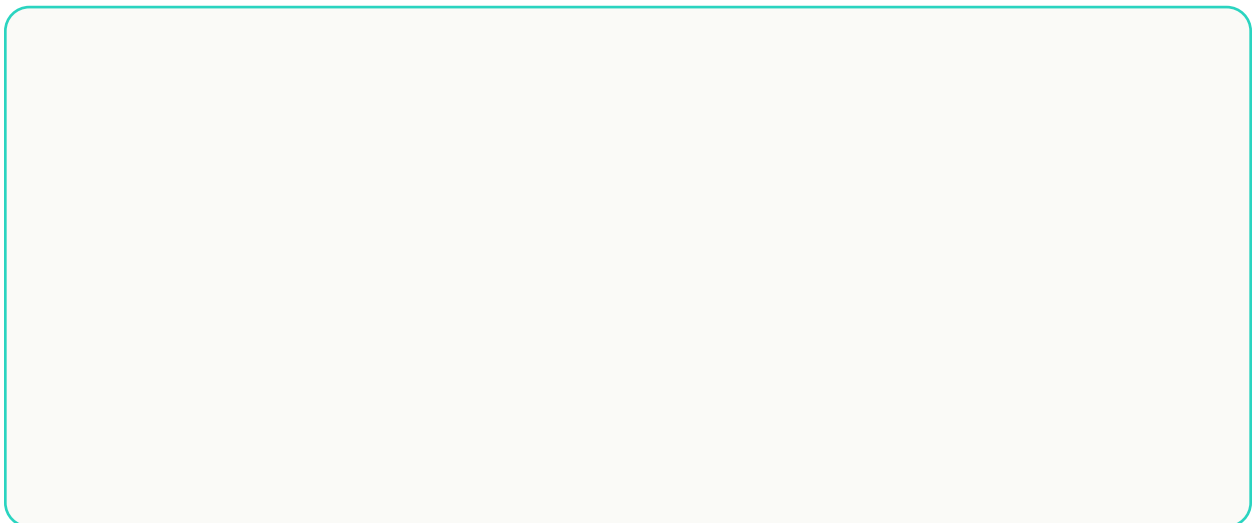
**Core path:**

The 12–20 pages you always present



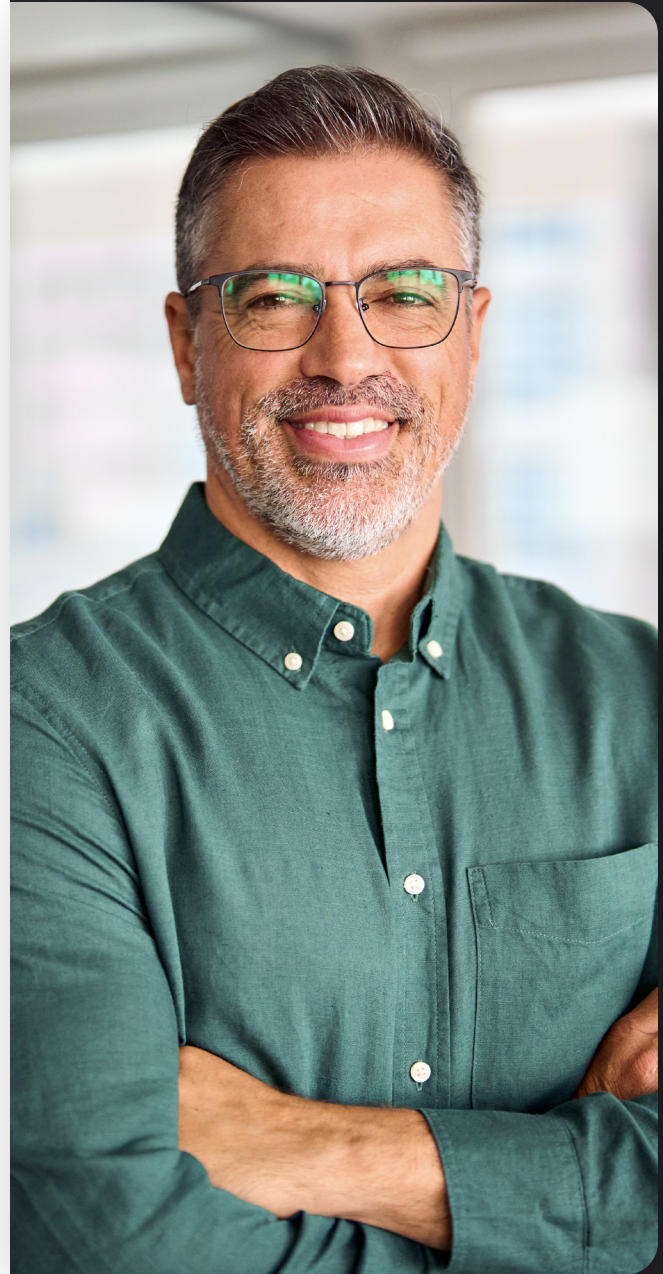
**Deep content:**

Optional proof, examples, FAQs, and comparisons you open only when relevant



Now your presentation is built to be understood: clear visuals, credible proof, and optional depth without clutter.

Next we'll focus on delivery—how to run the conversation confidently, keep homeowners engaged, and close with next steps that don't leave the decision hanging.





## Section 4:

# Delivery That Builds Trust and Moves the Deal Forward

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A strong presentation doesn't close deals on its own. Your delivery does.

Homeowners aren't just evaluating what you're offering. They're evaluating how you operate. Are you organized? Confident? Clear? Do you lead the process, or do you react to every question and lose control of the conversation?

This is where a lot of good decks underperform. The content is solid, but the rep:

- Rushes through the important parts
- Over-explains the technical details
- Gets pulled into side conversations
- Ends without a clear decision path

The goal of delivery is simple: **create confidence**. When the rep is confident, the homeowner feels confident. When the rep is scattered, the homeowner hesitates.

This section gives your team a practical approach to handling appointments that feel professional, steady, and easy to say yes to, whether they're in the home, on a video call, or presenting from a shared link after the appointment.



## Chapter 9:

# Practice the Parts That Matter So Reps Don't "Wing It"

## Practice isn't about sounding scripted, it's about staying in control

Top reps don't succeed because they "talk better." They succeed because they know the flow. They know how to transition, how to answer objections without rambling, and how to keep the homeowner oriented.

The difference between a pro and an amateur delivery is usually not product knowledge. It's consistency.

## What to practice (and what not to waste time on)

Practice these three things first:

### 1. Your opening

- Set the agenda in 20-30 seconds
- Confirm goals in the homeowner's words
- State the decision outcome you're working toward

### 2. Your transitions

- "Here's what we've learned."
- "Here's what we recommend."
- "Here's what this looks like in real projects."



Transitions keep the homeowner from feeling like you're jumping around.

### 3. Your close

- Investment framing
- Option selection
- Next-step commitment

Avoid over-practicing every page – it can make the talk track sound robotic. Reps need mastery of the key moments that decide the sale and the ability to pivot when the conversation starts going in a different direction.

## Use recording to tighten delivery fast

A simple way to accelerate improvement:

- Record one presentation per rep per week
- Review as a team
- Choose one improvement goal (pacing, clarity, objection handling, close)

This turns “training” into a repeatable habit instead of a one-time event.



# Team Practice Scorecard

Rate 1-5:

Agenda and opening clarity

1	2	3	4	5
---	---	---	---	---

Homeowner recap (personalization)

1	2	3	4	5
---	---	---	---	---

Pacing (not rushed, not rambling)

1	2	3	4	5
---	---	---	---	---

Visual usage (show-first, explain-second)

1	2	3	4	5
---	---	---	---	---

Objection handling (calm, structured)

1	2	3	4	5
---	---	---	---	---

Close and next steps (specific, confident)

1	2	3	4	5
---	---	---	---	---



## Chapter 10:

# Engagement Techniques That Keep Homeowners In the Conversation

**Stop presenting at homeowners. Present with them.**

The best contractor presentations feel like collaboration, not a lecture. That's how you keep attention, surface objections early, and avoid a surprise "we need to think about it" at the end.

**Plan at least three interaction moments into every presentation – and add more where it naturally fits your sales workflow.**

Use these three checkpoints:

### 1. After the recap

- "Did I capture that correctly?"
- "Is there anything you want to add before I show you what we recommend?"

### 2. After the recommendation

- "Based on what you told me, does this solution feel aligned?"
- "What feels most important to you: timeline, durability, budget control, or disruption?"

### 3. Before you show price/options

- "Before we talk numbers, what are you hoping this lands at?"
- "Are you more focused on lowest monthly payment or lowest total cost?"

These moments keep the homeowner engaged and give you better information before you talk about the investment.



## Handle questions without losing the flow

Homeowners will interrupt. That's normal. The mistake is letting the presentation turn into a free-for-all.

Use this simple approach:

- Answer the question briefly.
- Tie it back to the structure.
- Offer deeper detail only if they want it.

### Example:

“Great question. The short answer is \_\_\_\_. I'll show you exactly how we handle that in the next section. If you want, we can also look at a real project example after.”

## Remote and hybrid presentations: tighten and simplify

On video calls, attention drops faster. Adjust:

- Shorter sections
- More visuals
- More check-ins
- Fewer text-heavy pages
- Keep options and next steps extremely clear

### Engagement Prompts

“What concerns you most about doing this project?”

“If you had to pick one priority, what's #1?”

“What would make you feel fully confident moving forward?”

“Who else are you comparing us to?”



## Chapter 11:

# Close With Clarity and Follow Up Without Getting Ghosted

## Great closes feel like the obvious next step

A weak close sounds like: “So...what do you think?”

A strong close sounds like leadership: “Here are your best options. Based on what you told me, I recommend \_\_. The next step is \_\_. Let’s get that scheduled.”

You’re not pressuring. You’re guiding.

## Present options without creating confusion

Keep options to 2–3 max. Any more and homeowners stall.

Use options that are easy to understand:

- Base scope vs base + upgrades
- Good/better/best
- Faster timeline vs cost control (if applicable)

Always anchor your recommendation:

“Option B is what most homeowners choose because it balances \_\_ and \_\_.”



## Make next steps explicit and time-bound

Your presentation should end with a clear commitment:

- Deposit to reserve schedule
- Measurement appointment
- Design retainer
- Second meeting with decision-maker present
- Financing application step

Vague next steps create slow deals.

## The follow-up framework that prevents “no response”

Follow-up should not be “checking in.” It should be a recap with direction.

Send:

1. A brief summary of their goals and your recommendation
2. The exact option(s) discussed
3. Proof related to their biggest concern (timeline, mess, warranty, etc.)
4. The next step with a link or a scheduling action
5. A deadline or window (so it doesn't drift)



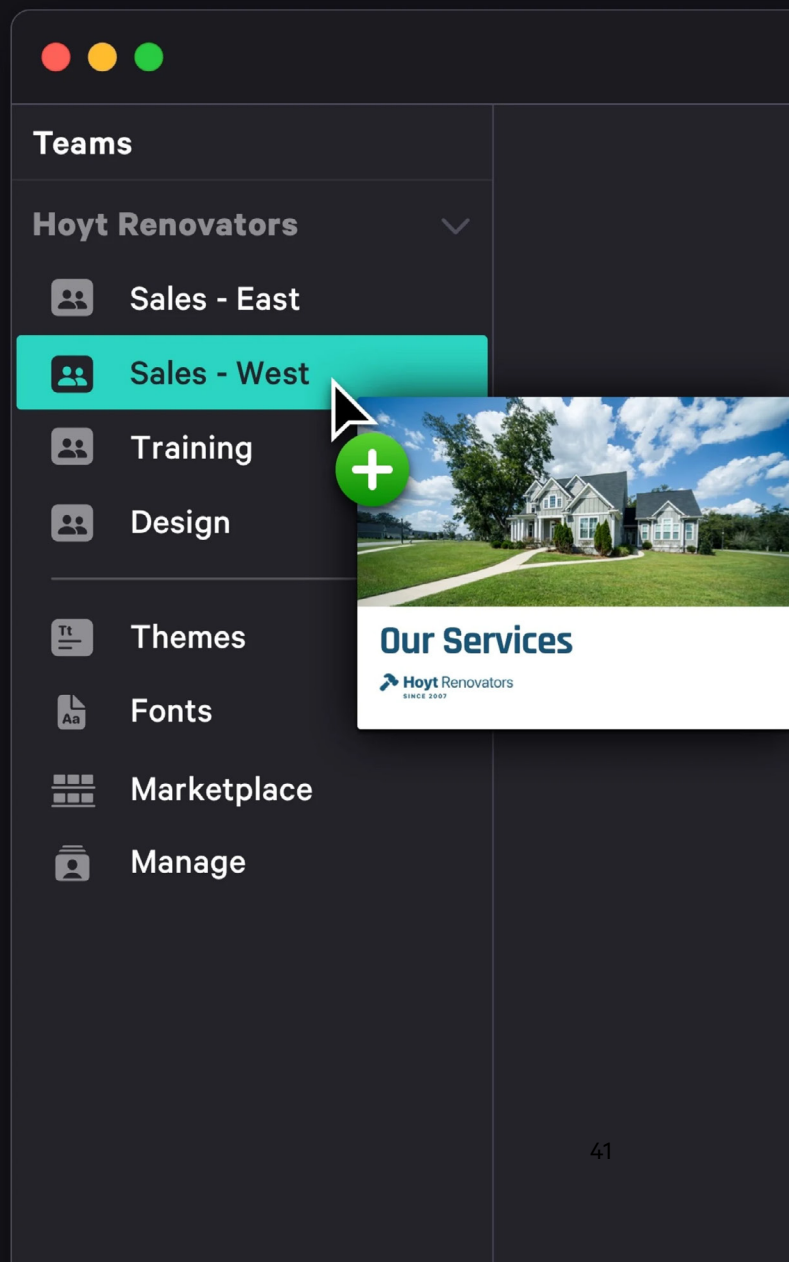
## Follow-Up Message Framework (Rep-Ready)

Subject: Next steps for your [project type]

- Quick recap of what you wanted:
- Recommended solution:
- Option(s) we discussed:
- What happens next:
- To move forward this week, the best next step is

At this point, you have everything you need to win more deals: a clear deck, strong visuals, and a delivery method that builds confidence.

Next, we'll turn this into a team system, standardizing the presentation, keeping it current, and improving it over time so your sales process gets stronger every month.



## Section 5:

# Make It a System Across the Sales Team

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If you want better results, you can't rely on one great rep.

As contractors grow, talent alone isn't enough. The difference between having a few strong closers and having a predictable sales process is whether your presentation is a system – standardized, measurable, and continuously improved.

This section is about building consistency without killing personalization. It's how you:

- Keep messaging, pricing, and positioning aligned across reps
- Shorten ramp time for new hires
- Reduce presentation sprawl (too many versions, too many pages, too many stories)
- Get better every month using real performance signals – not opinions



## Chapter 12:

# Standardize Without Sounding Scripted

## The goal is consistency in the right places

Standardization doesn't mean every rep becomes a robot. It means the parts that protect your brand and your margins stay consistent:

- The story arc (problem > solution > value)
- The core structure
- The proof you use
- The way you frame investment and options
- The next-step path

That frees reps to personalize where it matters: homeowner goals, objections, and project-specific scope.

## The “Core + More” Model

This is the simplest way to scale presentations:

### 1. Core deck (mandatory)

- Your best structure
- The minimum pages every rep must cover
- Your approved messaging and proof

### 2. Personalization layers (flexible)

- Project-specific sections (kitchen, bath, roofing, HVAC replacement, etc.)
- Neighborhood or “projects like yours” examples
- Objection modules (timeline, disruption, warranty, financing, complexity)



### 3. Deep library (optional)

- Extra proof
- Additional examples
- FAQs
- Product comparisons

This prevents the two most common problems:

- New reps building decks from scratch
- Veterans “freestyling” with outdated messaging

## Version control isn't optional when you're scaling

The fastest way for a sales team to lose trust is inconsistency:

- Two reps quoting differently
- Outdated warranty or financing language
- Old discounts and offers still floating around
- Mismatched messaging between marketing and sales

Set a rhythm: one owner for the deck, one monthly update window, and clear rules for what reps can and can't change.

### Standardization Rules

- Core deck pages are locked
- Reps can personalize: homeowner recap, scope detail, project photos, option selection
- Pricing language and warranty/service terms are controlled
- Approved proof only (no random review screenshots)
- Every rep presents from the current version



## Chapter 13:

# Improve Every Month With Presentation Analytics

## “What worked” is usually a guess

Most teams improve based on memory:

- “They seemed interested.”
- “They liked the financing.”
- “They got hung up on price.”

But the truth is: homeowners engage unevenly. Some sections earn attention. Others lose it. The only way to improve a presentation like a system is to measure behavior, not just outcomes.

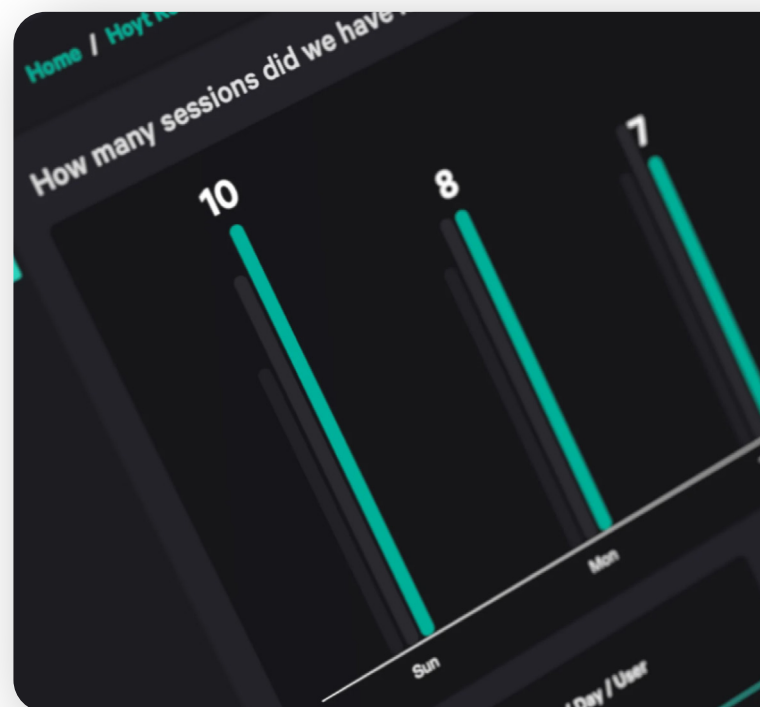
## What to measure (even if you keep it simple)

If your presentation is delivered digitally or shared after the appointment, you can capture signals like:

- Time spent by section
- Drop-off points
- Which proof gets opened
- Which options get revisited
- What gets skipped entirely

Those insights tell you:

- Where homeowners are confused
- What they care about most
- What content is slowing the sales cycle
- What actually supports decisions



Teams using Ingage can see exactly which sections homeowners engage with after the appointment and not just whether they opened the link.

## How to use engagement signals in weekly coaching

Analytics are only useful if they change behavior. A simple cadence works:

### Weekly

- Sales leader reviews a certain percentage of calls (one win, one loss, one stalled) depending on the size of the team.
- Identify one presentation improvement and one rep coaching point

### Monthly

- Review engagement trends
- Remove or rewrite low-value pages
- Add proof for common objections
- Refresh project examples

### Quarterly

- Rebuild modules for top-selling services
- Update positioning based on market changes and competition



# Monthly Deck Optimization Checklist

- Remove pages that don't help decisions
- Tighten pages that create questions or confusion
- Add 1 new “projects like yours” examples
- Update 1 objection module based on recent lost deals
- Align offers/pricing language across the team



## Chapter 14:

# Rollout Plan: Get Buy-In From Veterans and Ramp New Reps Faster

## Adoption is the hard part

Even great presentation systems fail if reps don't use them. Veterans resist because they "already know what works." New reps struggle because they're learning the company, the product, and the sales process at the same time.

The rollout needs to be practical, not theoretical.

## A simple 30-day rollout that sticks

### Week 1: Standardize the structure

- Lock the table of contents and flow
- Train on the story spine + transitions
- Require reps to present using the same sequence

### Week 2: Proof and objection modules

- Introduce the approved proof library
- Train how to use deep links/modules without derailing flow
- Run objection roleplays

### Week 3: Improve delivery

- Record presentations
- Coach openings, transitions, and closes
- Tighten pacing and engagement prompts



#### Week 4: Measure and refine

- Review wins/losses/stalls with the team
- Identify the top 3 friction points
- Update the deck and reinforce usage rules

### Incentivize usage the right way

You don't need to “force” adoption if the presentation helps reps close faster. But you do need accountability:

- Require the same core deck for all appointments
- Inspect presentation usage in deal reviews
- Celebrate wins that came from tighter structure and clearer next steps



# 30-Day Adoption Scorecard

## Track by Rep:

Percentage of deals presented with the standard core deck

Percentage of presentations recorded and reviewed

Close rate change over 30 days

Average ticket change over 30 days

Average sales cycle length change

Top objection categories by deal stage



**Conclusion:**

# Your Presentation Is Your Sales Process

A great presentation isn't a deck – it's how your business sells.

When your presentation becomes a system, you don't just get better conversion. You get:

- Faster onboarding
- Cleaner forecasting
- Less discount pressure
- More consistent customer experience
- A team that can scale without reinventing the wheel

Lead with clarity. Present with confidence. Win more of the right projects.

**Your presentation is your first impression, your sales system, and your best rep in the room.**

The Blueprint Builder gives you the structure to build it right and, the templates to start using it this week.

[Access the Blueprint >>>](#)

