

# 10 STEPS TO INSTALLING A HEAT PUMP: AN INSTALLER'S GUIDE

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## CUSTOMER INQUIRY

**OBJECTIVE** Understand your customer's needs.

**KEY ACTION** Obtain information and provide guidance about the process. Demonstrate your expertise.

2

## SITE SURVEY

**OBJECTIVE** Visit the site and assess the property's suitability for a heat pump.

**KEY ACTION** Inspect location, measure space, assess infrastructure.

3

## BUILDING A PROPOSAL

**OBJECTIVE** Present a detailed plan to the customer.

**KEY ACTION** Provide a proposal covering the estimated cost and timelines. Clearly outline the customer's options.

4

## SELECTING THE RIGHT PUMP

**OBJECTIVE** Help your customer to make an informed decision that meets their needs.

**KEY ACTION** Recommend options based on assessment results. Focus on efficiency and long-term value.

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## APPLYING FOR FUNDING & GRANTS

**OBJECTIVE** Pursue grants (where possible) to help manage costs through available incentive schemes. i.e. Boiler Upgrade Scheme (BUS).

**KEY ACTION** Assist customers and manage the application processes to claim incentives.

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## WORKING WITH DNOS & MCS

**OBJECTIVE** Ensure compliance with regulatory standards and obtain necessary permits.

**KEY ACTION**

1. Verify grid compatibility and installation permissions.
2. Submit applications to MCS regulation.
3. Determine if additional permits are needed based on local site regulations.

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## PREPARING THE SITE

**OBJECTIVE** Ensure the customer's property is ready for installation.

**KEY ACTION** Clear the area and ensure all tools and materials are ready.

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## INSTALLING THE PUMP

**OBJECTIVE** Install the heat pump at the customer's property.

**KEY ACTION** Complete a meticulous installation of the product.

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## TESTING THE SYSTEM

**OBJECTIVE** Verify the system is functioning correctly and working efficiently.

**KEY ACTION** Conduct comprehensive tests and adjust settings as needed.

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## POST-INSTALLATION FOLLOW-UP

**OBJECTIVE** Maintain customer satisfaction and assess system performance.

**KEY ACTION** Address customer queries and offer basic user maintenance advice.

## READY TO EXPLORE PROPOSALS?

Start building effective, beautiful proposals for heat pump installations

[DOWNLOAD GUIDE](#)