

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

1

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.

5

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.

6

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.

7

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.

8

INSTALLING THE PUMP

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

KEY ACTION Complete a meticulous installation of the product.

9

TESTING THE SYSTEM

OBJECTIVE Verify the system is functioning correctly and working efficiently.

KEY ACTION Conduct comprehensive tests and adjust settings as needed.

10

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](#)