

# Reset Your Heat Pump Offer

## With This 2026 Checklist



The federal tax credit is gone. Work through this checklist before your next heat pump campaign so your messaging, sales process, and team are ready with a new reason for homeowners to say yes.

### ☐ 1. Remove Every Reference to the Expired Tax Credit

#### Check:

- ☐ Website service pages
- ☐ Heat pump landing pages
- ☐ Specials / promotions pages
- ☐ Blog posts
- ☐ Email templates
- ☐ Google Business Profile posts
- ☐ Google Ads and Meta Ads
- ☐ Sales presentations

#### Update:

Search for phrases like "\$2,000 tax credit," "30% federal tax credit," "25C credit," and "federal rebate." Remove outdated claims or replace them with current incentives, financing options, and homeowner benefits.

### ☐ 2. Replace the Tax Credit With a Stronger Offer

The tax credit gave homeowners a reason to act. Now you need to create your own reason. Build your offer around:

- ☐ Monthly payment options
- ☐ Energy savings
- ☐ Year-round heating and cooling
- ☐ Increased comfort
- ☐ Avoiding emergency replacement costs

#### Instead of:

*"Save \$2,000 with the federal tax credit."*

#### Try:

*"Upgrade your heating and cooling system with payments starting at \$\_\_\_ per month."*

### ☐ 3. Create a Financing Message Your Team Can Repeat

Most homeowners do not decide based on total project cost — they decide based on whether the monthly payment fits their budget.

#### Confirm:

- ☐ Available financing terms

- ☐ Monthly payment examples
- ☐ Required credit qualifications
- ☐ Promotional financing periods
- ☐ Expiration dates

Make sure your website, ads, and sales team all communicate the same numbers.

#### ☐ 4. Build a Clear Answer for the Tax Credit Question

Homeowners will still ask:

*"Do I get a tax credit for this?"*

Do not leave your team guessing. Create:

- ☐ A website FAQ
- ☐ A CSR response script
- ☐ A sales objection response
- ☐ An email response template

**Your answer should clearly explain:**

- ☐ The old federal credit expired
- ☐ What incentives may still exist locally
- ☐ Why the system still makes sense without the credit

#### ☐ 5. Find Every Available Local Incentive

The federal credit is not the only opportunity. Research:

- ☐ State rebates
- ☐ Utility incentives
- ☐ Manufacturer promotions
- ☐ Income-qualified programs
- ☐ Local energy efficiency programs

Update your website and sales materials so homeowners see every option available to them.

#### ☐ 6. Reactivate Your Existing Customer Base

Your easiest heat pump sale may already be sitting in your database. Create a list of customers with:

- ☐ Systems installed 10+ years ago
- ☐ Older furnaces and AC units
- ☐ Frequent repair history
- ☐ Expensive recent service calls

Reach out before the next breakdown happens.

#### ☐ 7. Update Your Advertising Message

If your ads still lead with the tax credit, homeowners may ignore them or lose trust. Review:

- ☐ Google Search Ads

- ☐ Local Services Ads
- ☐ Meta Ads
- ☐ Display campaigns

**Replace incentive-focused messaging with:**

- ☐ Comfort
- ☐ Efficiency
- ☐ Reliability
- ☐ Monthly affordability
- ☐ System replacement timing

## ☐ 8. Train Your Customer Service Team

Your CSRs are often the first person homeowners ask about incentives. Give them a simple response for:

*"Is there still a tax credit?"*

Make sure they know:

- ☐ What changed
- ☐ What incentives remain
- ☐ How to transition into booking an appointment

A confused CSR can lose a qualified lead before your sales team ever gets involved.

## ☐ 9. Explain the A2L Equipment Change

New heat pumps come with updated refrigerants and equipment requirements. Your customers may ask:

*"Why is this system more expensive than last year?"*

Prepare your team with a simple explanation:

- ☐ New equipment requirements increased costs
- ☐ The change is industry-wide
- ☐ It is not an arbitrary price increase

Transparency builds trust.

## ☐ 10. Update Your Reviews and Case Studies

Your marketing should reinforce the reasons homeowners choose heat pumps today. Highlight reviews mentioning:

- ☐ Lower energy bills
- ☐ Improved comfort
- ☐ Quiet operation
- ☐ Reliable heating
- ☐ Better temperature control

Do not rely only on old incentive-based messaging. Let past customers explain the value.