



Unlocking Growth

A Neighborly® Webinar Series

November 2025

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This information is being presented for informational purposes only. Nothing contained in this document should be construed as legal, financial or other advice. All content is of general nature and does not address the circumstances of any particular individual or entity. Each Franchise Business Owner shall at all times remain the sole employer of their own employees and shall make any and all decisions regarding the essential terms and conditions of their employees' employment with the locally owned and operated Franchise Business. Each Franchise Business Owner acknowledges and agrees that neither Neighborly nor any of its franchisor brands shall be deemed a joint employer with any franchise business owner for any reason.

Sales Excellence



- **Leveraging Financing to unlock and accelerate efforts across all pillars of Sales Excellence**
 - Train SPs on when and how to mention financing/flexible payment plans
 - Maximize vendor offerings
 - Identify objections and best ways to respond

Agenda

- How financing fits into CUSTOMER
- Vendor resources and assets
- Best practices from fellow franchise owners

Introducing Financing – The CUSTOMER Experience

The **CUSTOMER** Experience

TRUSTED SERVICE. PROVEN RESULTS.

neighborly

your hub for home services™

C – Cultivate a Relationship

- Greet warmly and introduce yourself using their name.
- Present a polished appearance and use inviting body language.

U – Understand the Situation

- Ask thoughtful, open-ended questions to learn the full story.
- Observe the space carefully to gather contextual clues.

S – Search for Motives

- Explore why the issue matters now and what outcome they expect.
- Listen for emotional drivers and offer early reassurance.

T – Take Charge

- Provide clear direction so the customer knows what to expect.
- Look beyond the problem to uncover related needs or opportunities.

O – Offer Solutions

- Present up to three tailored options with clear benefits.
- Connect each choice to what they value most.

M – Make it Happen

- Confirm their choice with confidence and prep professionally.
- Reassure them you're ready by reviewing next steps.

E – Execute with Excellence

- Work with precision while keeping the customer informed.
- Walk them through the results and confirm satisfaction.

R – Reach Out

- Leave behind a thoughtful reminder and invitation to reconnect.
- Follow up 24 – 48hrs after service is completed to reinforce care and loyalty.



AIRSERV
HEATING & AIR CONDITIONING

DRYERVENT
CLEANING

FIVE STAR
PAINTING

GLASSDOCTOR

the GroundsGuys

JUNK KING

LawnPride

MOLLY MAID

MR. JOE

MR. APPLIANCE

Mr. Electric

Mr. Handyman

Mr. Roofers

ShelGenie
SOUTH BAY SERVICE

WINDOW GENIE

Take Charge - The Ideal Moment to Plant the Seed

“

“I’m not sure if it’s for you, but many customers take advantage of our flexible payment options.”

O & M: Value, Choice, and Confidence

Offer Solutions and Make It Happen

O – Present clear options tied to comfort and impact.

M – Handle hesitations with empathy, then connect back to value.

Key Reminder:

“Too expensive” rarely means “can’t afford it.”





CUSTOMER RILLA FINANCING SUPPORT

TRAIN. COACH. SUPPORT.

Neighborly Training Site

THREE KEYS TO SUCCESS

CUSTOMER - RILLA - FINANCING

<https://training.neighborly.com/>



Unlock the Power of Integrated Financing

HELP GROW YOUR CLOSE RATES AND YOUR CUSTOMER'S ACCESS TO INCREASED BUYING POWER

A presentation prepared for:





Who Is GreenSky®?



6.5+ Million
Satisfied Customers



\$57 Billion
Cumulative
Transaction Volume
(through 2024)



\$6.7 Billion
Of loans for home
improvement projects
in 2024

Subject to credit approval. GreenSky® Program consumer loans are made by Synovus Bank, Member FDIC, NMLS #408043, without regard to age, race, color, religion, national origin, gender, disability, or familial status. GreenSky Servicing, LLC ("GSS", NMLS #1416362, www.nmlsconsumeraccess.org) is a financial technology company that manages the GreenSky® Program by supporting originations and servicing the loans on behalf of banks and other financial institutions that make or hold program loans. GreenSky® is a registered trademark of GreenSky, LLC and is licensed to banks and other financial institutions for their use in connection with the GreenSky® Program. GreenSky LLC and GSS are not lenders. All credit decisions and loan terms are determined by program lenders.



GreenSky® The GreenSky® Advantage

- Paperless, seamless application process
- Special financing for various Customer needs:
 - No payments and no interest if paid in full in promo period¹
 - No Interest if paid in full in promo period with minimum payments²
 - Fixed rate monthly payment plans
 - 0% APR plans
- The borrower does not need to be the homeowner
- Work can be performed on second homes or vacation homes
- Credit limits up to \$100,000³
- The Customer has up to 6 months to use their loan credit limit
- Applicants may be approved for additional credit
- Joint applicants are welcomed on prequalification and application
- One-on-one consulting to sharpen your sales strategy
- **ServiceTitan application and transaction integrations**

¹Subject to credit approval. Interest is billed during promo period but will be waived if the amount financed is paid in full before promo period expires. ²Subject to credit approval. Interest is billed during the promo period but will be waived if the amount financed is paid in full before the promo period expires. Monthly payments are required during the promo period, but making only the required monthly payments will not pay off the amount financed by the promo period expiration date. ³Subject to credit approval.





To Defer Interest
May prefer deferred interest plans

PROMOTIONAL PERIOD OFFERS

No Interest if Paid in Full with Payments¹

No Payments, No Interest if Paid in Full²



To Borrow for a Longer Term
May prefer plans that offer fixed monthly payments

ZERO INTEREST PLANS

0% APR for the Life of the Loan

FIXED RATE PLANS

Fixed Monthly Payments

All loans offered through the GreenSky® program are subject to credit approval. ¹Interest is billed during promo period but will be waived if the amount financed is paid in full before promo period expires. Monthly payments are required during the Promo Period but making only the required monthly payments will not pay off the amount financed by promo period expiration date. ²Interest is billed during promo period but will be waived if the amount financed is paid in full before promo period expires. Monthly payments are not required during the promo period.

Developing the Right Financing Strategy





To Defer Interest
May prefer deferred interest plans

PROMOTIONAL PERIOD OFFERS

No Interest if Paid in Full with Payments¹

No Payments, No Interest if Paid in Full²



To Borrow for a Longer Term
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How to Sell Payment Options

\$4,500

**6 MONTHS
NO INTEREST AND
NO PAYMENTS**

OR

\$69/MONTH

\$5,500

**12 MONTHS
NO INTEREST AND
NO PAYMENTS**

OR

\$14 MORE A MONTH



Apply for Financing with the GreenSky® Program

GreenSky

DESIRED FINANCED AMOUNT
\$10,000.00

Select a Plan

Lowest Payment	Mixed Interest	Lowest APR	Fixed Rate
MIN. PAYMENT \$0.00 /mo. first 12 months	\$100.00 /mo. next 36 months	MIN. PAYMENT \$151.00 /mo. for 84 months	MIN. PAYMENT \$0.00 /mo. first 6 months
MAX APR 9.99%		MAX APR 6.99%	MAX APR 24.99%
DESCRIPTION No interest and no payments during 12 month promo period		DESCRIPTION Equal monthly payments	DESCRIPTION No interest if paid in full within 6 month promo period
View Terms		View Terms	View Terms
Select Plan		Select Plan	Select Plan
How it Works		How it Works	How it Works

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Equal Housing Lender

Cancel

For illustrative purposes only. Subject to change.

ServiceTitan/GreenSky® Integration

Putting it Into Practice

For illustrative purposes only. Subject to change.

GreenSky® and ServiceTitan Integration

Fast Plumbers

Proposals > Repair Current Air Conditioner / Replace with New Air Conditioner System

Remove ice from condenser fan

STATUS: Accepted | SERVICE ADDRESS: 300 Market St., San Francisco, CA 94109 | DATE CREATED: Apr 4, 2024

SUMMARY

Start by removing ice from air conditioner's evaporator coils. The unit will need to be turned off at the thermostat and the circuit breaker. The ice will need to thaw naturally, and possibly use the fan-only setting to circulate warm air. Once everything is thawed, the coils will need to be cleaned with a brush or towel, and the air filter and drain pan will need to be inspected for any issues. Finally, we will need to ensure the system dries completely before restarting. I also presented a proposal for the customer to consider replacing their current air conditioning system with a new air conditioning system, which will be more efficient since their current unit is 9 years old.

Select Your Estimate

GOOD

Air Conditioner System w/ WIFI SMART Thermostat

Accepted

We propose the following comprehensive scope of work for the heating and air conditioning system upgrade:

- Remove and properly dispose of the existing heating and air conditioning unit
- Ensure all work complies with local safety and environmental regulations, including the proper handling and disposal of refrigerants and other hazardous materials...

TOTAL PRICE: **\$10,000.00**

Est. monthly payment of **\$132.00/mo**

GreenSky Financing Terms | See If You Prequalify >

View | Sign & Accept

BETTER

Mid-Range AC System + Air Filtration System

Ready to sign

We propose the following comprehensive scope of work for the heating and air conditioning system upgrade:

- Remove and properly dispose of the existing heating and air conditioning unit
- Ensure all work complies with local safety and environmental regulations, including the pro...

Show more

TOTAL PRICE: **\$12,000.00**

Est. monthly payment of **\$128.40/mo**

GreenSky Financing Terms | See If You Prequalify >

View | Sign & Accept

CONTACT US: (225) 555-0118 | support@fastplumbers.com

POWERED BY ServiceTitan

For illustrative purposes only. Subject to change.

Product and payment options are shared with the Customer, so they can make the selection that best suits their needs.

For illustrative purposes only. Subject to change.

GreenSky® and ServiceTitan Integration

Apply for Financing with the GreenSky® Program

GreenSky

DESIRED FINANCED AMOUNT
\$10,000.00

Select a Plan

Lowest Payment	Mixed Interest	Lowest APR	Fixed Rate
MIN. PAYMENT \$0.00 /mo. first 12 months	\$100.00 /mo. next 36 months	MIN. PAYMENT \$151.00 /mo. for 84 months	MIN. PAYMENT \$0.00 /mo. first 6 months
MAX APR 9.99%		MAX APR 6.99%	MAX APR 24.99%
DESCRIPTION No interest and no payments during 12 month promo period		DESCRIPTION Equal monthly payments	DESCRIPTION No interest if paid in full within 6 month promo period
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How it Works		How it Works	How it Works

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EQUAL HOUSING LENDER

[Cancel](#)

For illustrative purposes only. Subject to change.

The Customer selects their preferred loan plan.

For illustrative purposes only. Subject to change.



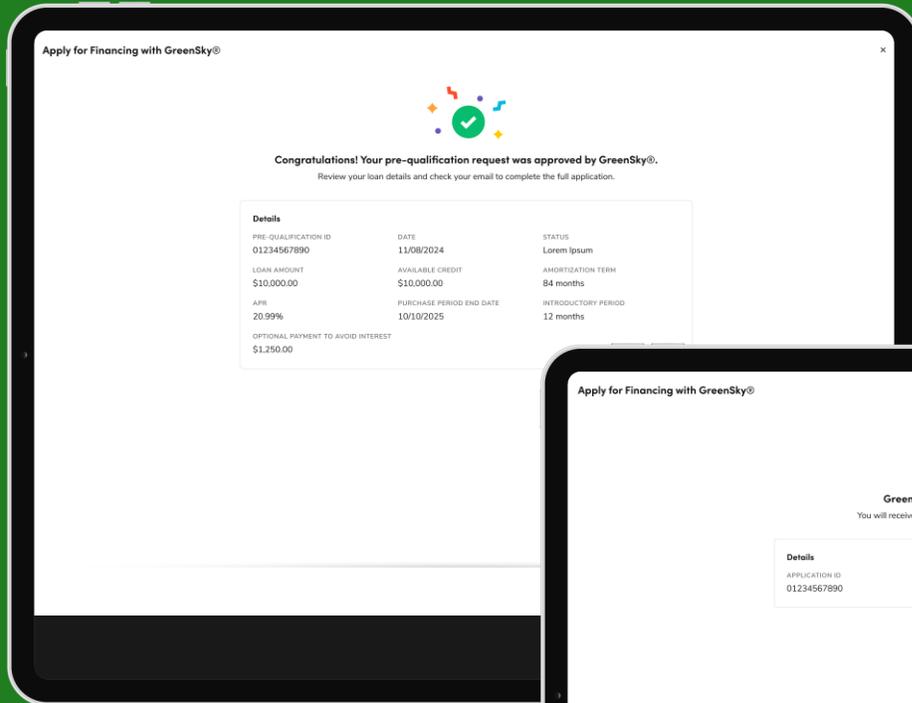
GreenSky® and ServiceTitan Integration

Customer submits a prequalification request.

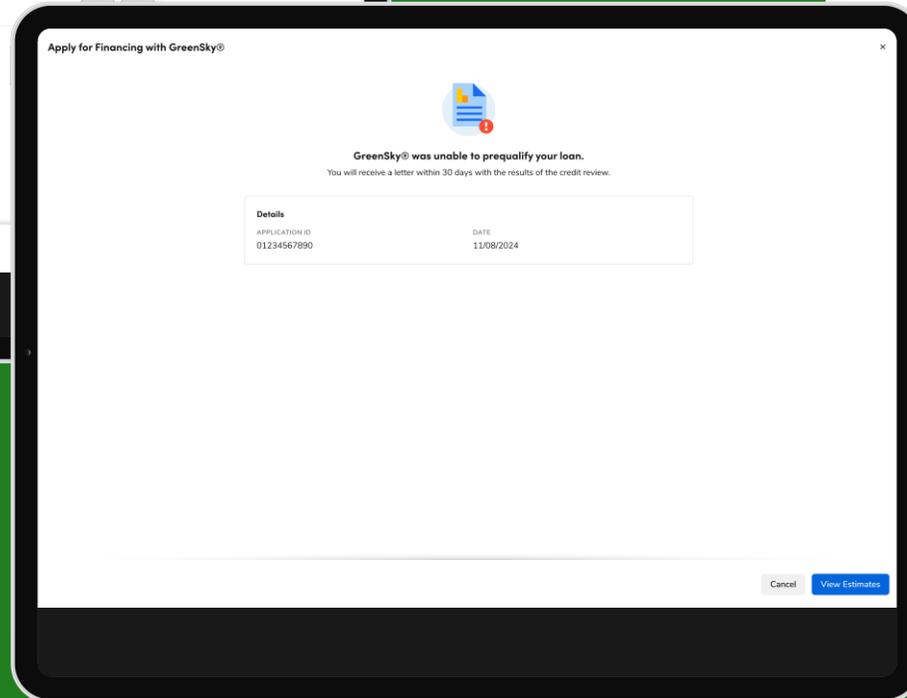
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OR

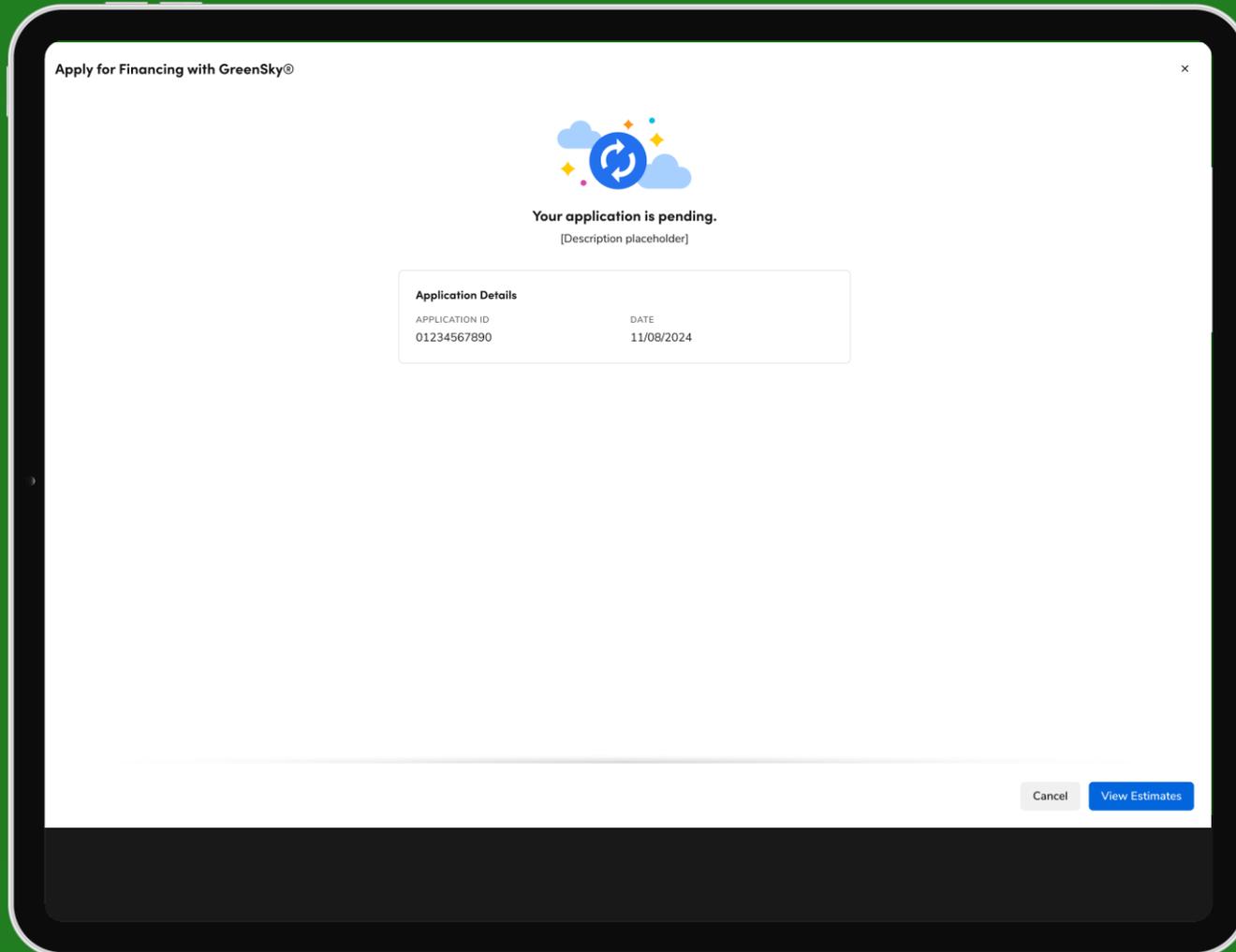


Customer receives prequalification credit decision within seconds,¹ and without impact to their credit.

¹Applications with data entry or credit check complications may be decisioned in a period longer than seconds.

For illustrative purposes only. Subject to change.

GreenSky® and ServiceTitan Integration



Customer submits loan application and awaits final credit decision. Once received, Customer may accept and begin authorizing funding.

For illustrative purposes only. Subject to change.



Resources to Support You

Customer Service

(866)-936-0602

Saturdays & Sundays: 8 a.m.–11 p.m. ET

Mondays–Fridays: 8 a.m.–12 a.m. ET

Service Concierge (for Merchants)

(800) 357-1558

Mondays–Fridays: 8 a.m.–9 p.m. ET

Email: Merchants@GreenSky.com



Best Practices from the Experts

Deborah Coop

Precision Garage Door of
Central Arkansas



a neighborly company

Gavin Jones

Mr. Electric of Middletown
and Newark



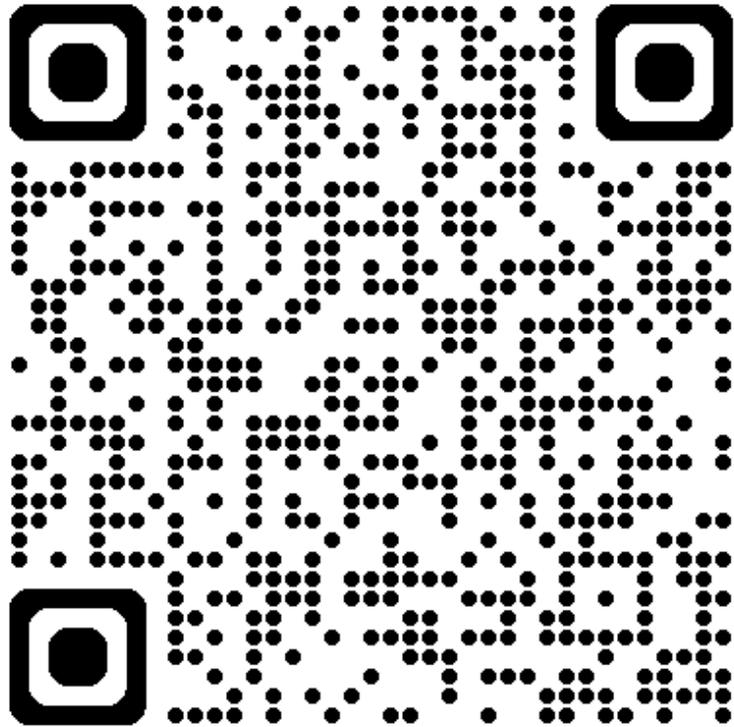
a neighborly company

Financing Office Hours

**Monday-Friday
10-11am Central**



Unlocking Growth Webinar Recordings and Resources



Survey



Upcoming Unlocking Growth Webinars

December 2/4

**Broadly CRM
& Social Media
Best Practices**



December 9/11

**Weekend Work
Opportunities**



December 16/18

**TradeEngage/
Capturing
Adjacencies**



Thank You