PLAYBOOKS

BETTER FIELD SALES, WITHOUT THE PRESSURE

Most field sales problems come from skipping steps. Here is what to do on every opportunity, and how to follow up when the answer is not yet.

SELL THE WAY YOU WOULD WANT TO BE SOLD TO

Customers can tell when a recommendation is about them and when it's about your close rate. Never sell work the home doesn't need. The long game, with referrals, reviews and repeat work, pays better.

EVERY VISIT

1. **Ask before you look.** What's bothering them? What have they already been told? What would a good outcome be?
2. **Inspect everything.** Don't stop at the first problem. Take photos.
3. **Show findings.** Sit down with the customer and go through what you found, in plain language.
4. **Present options.** Good, better and best where they truly apply, including the smallest honest fix. Let the customer choose.
5. **State the price clearly,** then stop talking.
6. **Ask for the decision.** "Which of these makes the most sense for you?"
7. **Put everything in writing.**

COMMON OBJECTIONS

THEY SAY	TRY
I need to think about it.	Of course. What part do you want to think through? I may be able to answer it now.
That's more than I expected.	What did you have in mind? Let's see which option gets closest, and what you'd give up.
I'm getting other quotes.	You should. When you compare, look at [equipment, scope, warranty, permit]. I'll write mine so it's easy to compare.
I need to talk to my spouse.	Makes sense. Could I walk you both through it, or what would be helpful for you to have?

TECHNICIAN-GENERATED LEADS

Techs are in more homes than your salespeople. Teach them to spot, photograph and note, not to sell. Agree on when to bring in an advisor, and pay fairly for a lead that turns into a sale.

THE FORTUNE IS IN THE FOLLOW-UP

- Send the written options the same day.
- Call at 2, 30, 90 and 180 days using the estimate follow-up script.
- Log the reason for every no.
- Stop when someone asks you to stop.

KNOW YOUR NUMBERS

- Close rate by person and by lead source
- Average sale
- How often all options were shown
- Unsold estimates that received follow-up
- Callbacks and cancellations after the sale

STAY OUT OF TROUBLE

- The FTC Cooling-Off Rule gives buyers three days to cancel certain sales made at home, including when they invited the salesperson. It does not cover some sales, such as emergencies or repairs and maintenance the customer requested, but purchases beyond that request are covered. State rules may add more. Ask your attorney what form you need.
- Use your lender's approved financing language and disclosures. Don't describe terms from memory.
- Don't quote rebates or credits unless you have confirmed them this month.

PREPARE BEFORE YOU KNOCK

Review the customer's history and any notes from the booking call. Who's going to be home? Has the customer received an estimate before? Is this a repair that could become a replacement? Going in prepared shows respect, and it saves everybody time. Make sure every decision maker can be present for larger purchases, and ask ahead of time.

MEASURE THE HOME, NOT JUST THE EQUIPMENT

For a replacement, sizing it by the old unit's label is a shortcut that can lead to comfort problems. Do the proper load calculation and look at the ductwork. For plumbing and electrical, look at what the rest of the home can handle. A complete assessment justifies your price and separates you from the low bid.

TALK ABOUT MONEY EARLY AND CALMLY

Ask about budget without making it awkward: "Some folks want the lowest cost that fixes this. Some want the best long-term answer. Where are you leaning?" You aren't trying to size up their wallet. You're trying to show them relevant options.

BRING A SECOND ADVISOR ALONG

Ride-alongs work for salespeople too. Most advisors have never watched someone else sell. Pair them up for a day. Record practice presentations, and critique them together. Weekly role-play on one objection beats a yearly sales seminar.

MAKE EVERY LOST SALE TEACH YOU SOMETHING

Ask politely: "Could I ask what led you to go in another direction?" Log the answers by advisor and lead source. If you often lose on price, compare scopes. If you're losing on trust, look at your reviews, your presentation and how quickly you get back to people.

Sources: FTC, Cooling-Off Rule; Service ProCall program guidance.

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BEST PRACTICES: CLOSE RATE AND AVERAGE TICKET IN THE HOME

MAKE IT A HABIT

What good looks like

> Every visit ends with written options: good, better and best.

> Financing offered on every larger option.

> Close rate and average ticket tracked by tech, every month.

The habits

1. Use the same inspection checklist on every visit, so nothing is missed.
2. Show photos of what the tech found before talking price.
3. Present options in writing, with a monthly payment on each.
4. Ask for the decision, and accept "not today" without pressure.
5. Ride along and role-play monthly. Coach one habit at a time.
6. Hand unsold options to a follow-up process, not the tech's memory.

Signs it's time to get help

- Close rates vary widely between your techs.

- Options are given verbally, if at all.
- Financing is offered only when the customer asks.

Where we fit: ProCall Field gives techs the inspection checklist and the good-better-best options sheet, with monthly payments and a signature.

More on close rate and average ticket in the home