

SUCCESSFUL REMODELING SALES

STEP - BY - STEP

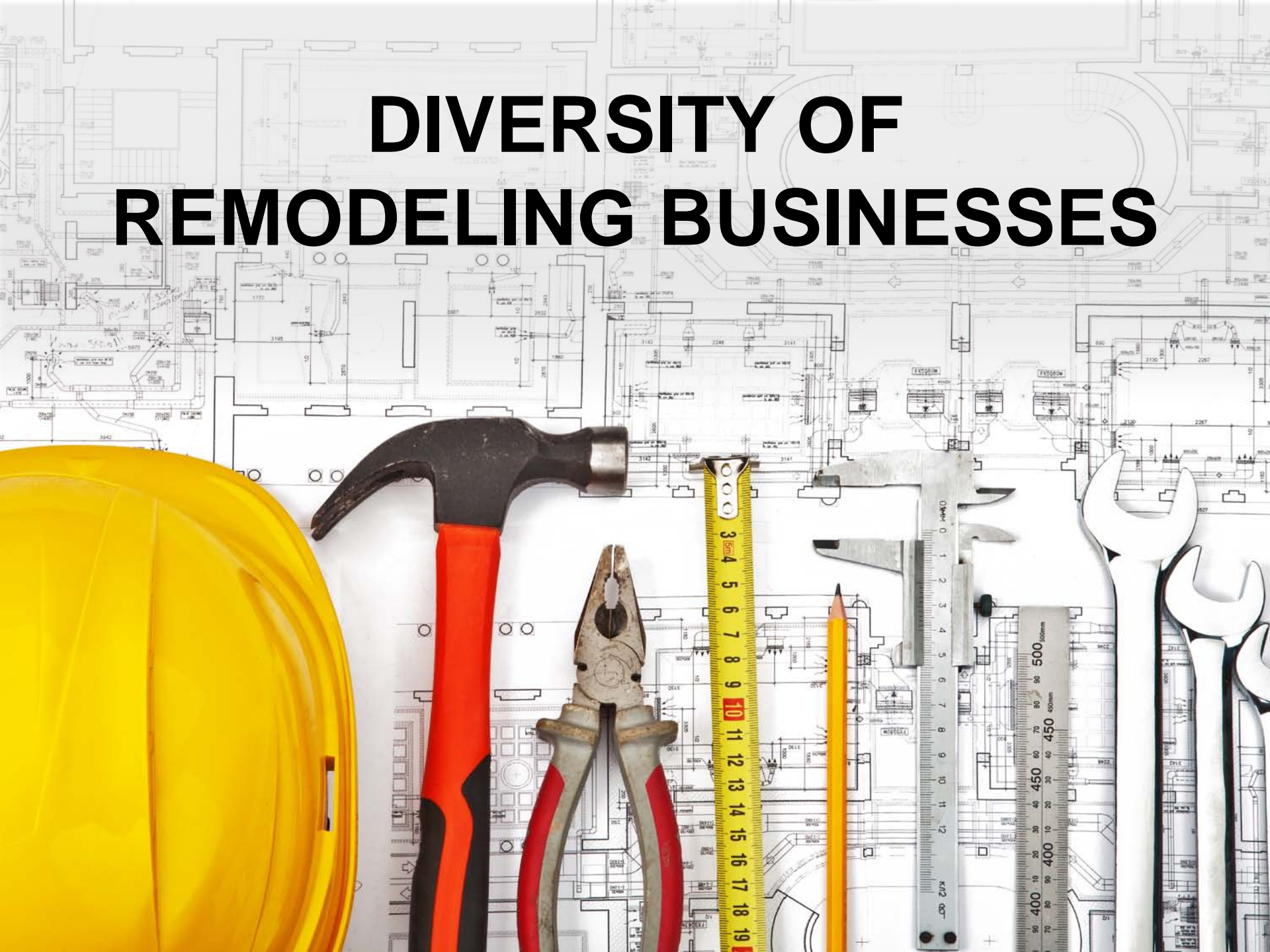
FEBRUARY 5, 201 | 10:00 – 11:00 AM

BILL SHAW // NAHBR, HOUSTON, TX

LEARNING OUTCOMES

- Learn the methodology behind the sales process for remodeling jobs from start to close
- Customize the sales process and understand the approach for a customer's background, preferences, personality, and psd
- Select the right clients by learning how to subtly identify their budget and their core needs
- Develop a sales plan that consistently asks for referrals, testimonials, and additional business

DIVERSITY OF REMODELING BUSINESSES



A BASKET OF TYPES

Repair and maintenance

Exterior contractor

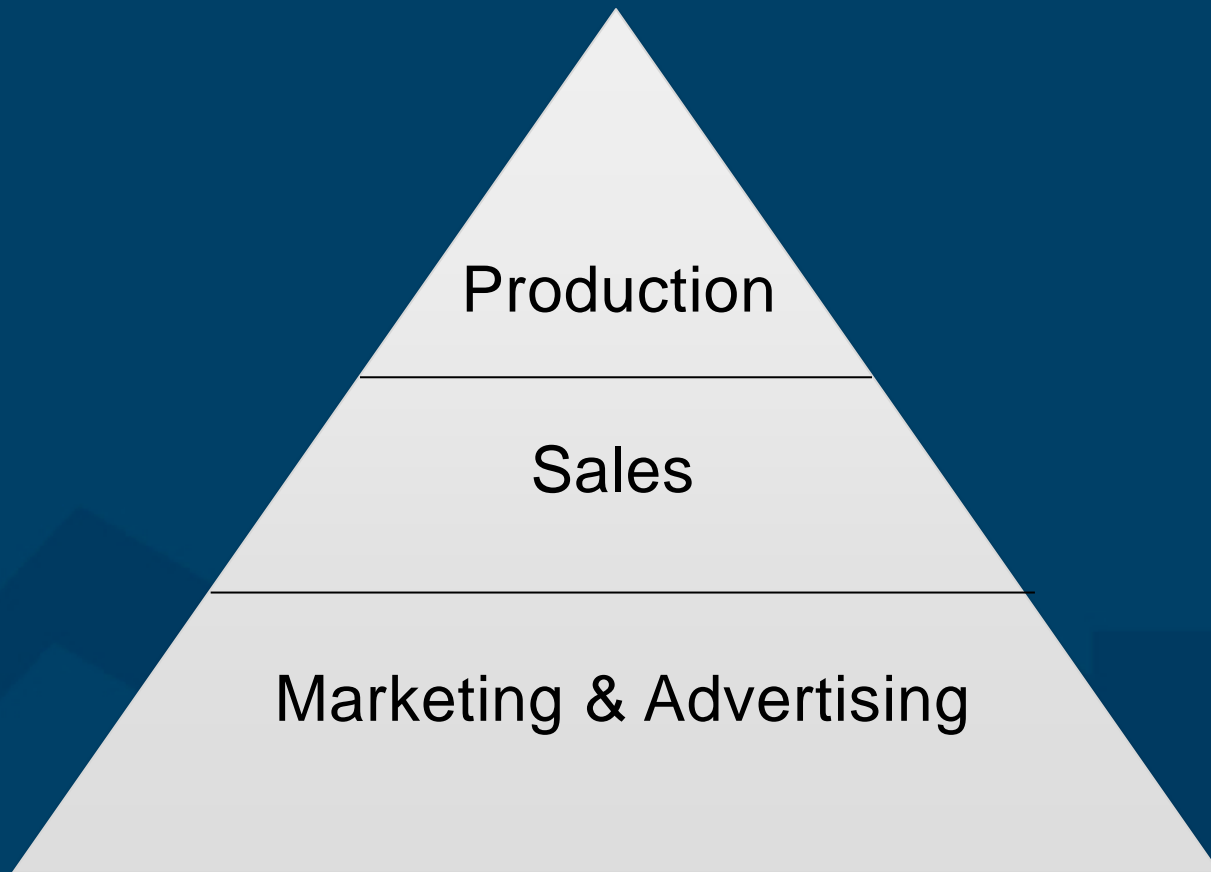
Insurance restoration

Full service remodeler

Kitchen and bath specialist

Design-build-remodeler

IMPORTANCE OF SALES TO A REMODELER



WHO SELLS?

BUSINESS OWNERS (85%)

SALES PERSON (10%)

SALES TEAM (5%)



ARE WE QUALIFIED TO SELL?

(DO YOU HAVE A DEGREE IN SELLING?)

LEARN FROM:

**Experience learned from calls,
friends,**

Networking, and other remodelers

Educational programs (little pieces)

NAHB

NARI

Trade shows

Seminars-Workshops

Formal training

Sandler Sales

Dale Carnegie

Franklin Covey

INHERENT PROBLEMS

- ✓ No defined sales system and processes
- ✓ Not understanding who the lead is and their fit
- ✓ Maintaining control of the lead and the sales process
- ✓ Does the lead trust the salesperson and respect his expertise?
- ✓ What is their budget and scope of work and are the two realistic and aligned?
- ✓ What questions should I be asking?
- ✓ Who are my competitors?
- ✓ Is the lead price shopping and looking for free information? Does the lead have their own drawings or sketches and they just want a quote?

KEY INGREDIENTS FOR SUCCESS



Sales System and Processes

Sales Training

METHODOLOGY BEHIND THE SALES PROCESS

The sales system based on a “warm” lead

Lead intake

Lead preparation & background discovery

Lead phone interview and qualification

Qualified lead pre-meeting materials

Qualified lead initial appointment

Qualified lead follow up

Qualified lead decision (sale/lost lead)

Lost lead follow up program

LEAD INTAKE

Who will answer the call?

Accountability tracking tool

Preparation for the phone interview

Professionalism

**Person taking the lead initial
information may or may not
complete discovery and/or set up
the initial phone call**



LEAD INTAKE TRACKING FORM

LEAD INTAKE

DATE: _____

NAME: _____

ADDRESS: _____

PHONE NO. _____

REFERRAL NAME: _____

REFERRAL SOURCES: _____

☐ **Referral Thank you Sent**

☐ **Sales Person Notified**

LEAD PREPARATION & BACKGROUND DISCOVERY

What can I discover about the lead?

Appraisal district information

Google maps (picture of home & neighborhood)

Fema flood maps

Social media

Education

Work-business

Professional designations-awards

Friends

Problems/issues about their home

Pictures of the lead and family

LEAD INITIAL PHONE CALL

Set an appointment for the call

Discuss date-time-duration-agenda

LEAD INITIAL PHONE CALL

The initial call

- Define call duration again
- Fill out sales lead sheet or qualification form
- Get permission to ask questions and explain the purpose of the questions
- Natural conversation and interject key questions
- Define scope of work and investment range

LEAD INITIAL PHONE CALL

Call is a format for building:

Trust

Professionalism

Communication skills

SALES LEAD INFORMATION

CALL DATE	CALL RETURN	CLIENT TYPE	LEAD OUTCOME	REASON FOR OUTCOME
			/	
LEAD SOURCES			REFERRED BY:	

NAME: _____ SPOUSE: _____

ADDRESS: _____ Zip _____

JOB SITE: _____ HOME PHONE: _____

HIS OFFICE: _____ CELL: _____ E-MAIL: _____

HERS OFFICE: _____ CELL: _____ E-MAIL: _____

PROJECT DESCRIPTION: _____

- Who are ALL the decision makers? _____
- Have you remodeled in the past: Yes _____ No _____
- How was that experience? _____
- Have you already worked with a professional designer/architect on this project? Yes _____ No _____
- Are you interviewing other remodeling firms? Yes _____ No _____
Which ones? _____
- Do you have a time frame or constraints that you need to meet? Yes _____ No _____
Start date: _____ End date: _____
- Are you working with a specific budget? Yes _____ No _____ Approximate amount _____
- How will the project be funded? _____
- How long have you considered this project? _____
- What year was your house built? _____ How long owned your home? _____ Future Commitment _____

INITIAL APPOINTMENT:	DATE:	TIME:
REMODEL _____	DESIGN _____	OUTSOURCE _____

PERSONAL INFORMATION:

OCCUPATIONS (M) _____ (F) _____

CHILDREN (NAMES/AGES) _____

PERSONAL NOTES/INTERESTS & PETS _____

CORE ISSUES/NEEDS: _____

Data Entry: Client Info _____ Appt. _____ BROCHURE /NOTEPAD _____

QUALIFIED OR NOT?

Qualified for next steps based on company parameters?

Distance

Scope

Budget

Schedule

Is the lead a good fit?

Personality

Income

Their requirements

Ability to meet

QUALIFIED!!! NEXT STEP

SETTING THE INITIAL APPOINTMENT

- Your position in the interview process (first-last)
- When you are available (you have a personal and business life)
- Set the following:
 - Date-time-location-duration
- Your agenda and their agenda
- Environment of the meeting
- Pre meeting documents or homework

PROMOTIONAL MATERIALS

What to send before the meeting

- Interview questions
- “Need-want-wish” list
- Sales process
- Reference list
- Social media presence

At the meeting

- Presentation book
- Ipad with pictures
- Brochure
- Gift

What to follow up with after the meeting

- Personal thank you note + email
- Fulfill any client requests

LEAD INITIAL APPOINTMENT

KEYS TO SUCCESS

Be on time

Appearance (Equal Stature)

Review your lead information

Qualifying questions and potential answers

Control the interview politely

Talk only as needed (10 – 20%)

Stick to system and plan

Build trust and rapport

Understand body language, tonality & mirroring

Language matters

THE PLAN FOR THE MEETING

KEY ELEMENTS OF A SUCCESSFUL MEETING

Set a contract right away

- Define a successful meeting
- Their questions
- Your questions
- Budget discussion
- Next steps

Personal reasons for the project

Contractor selection

THE PLAN FOR THE MEETING

KEY ELEMENTS OF A SUCCESSFUL MEETING

Budget

- Use “investment range”
- Use a third party story

Price Issues

- Understand the reasons for multiple bids

Post Sell

Come away with something

- Sale
- Next step
- Decision making timeline
- Additional Information needed to make a decision

NEED TO KNOW

True scope of work by priority (needs vs. wants)?

Moving to another home or building new

Real reasons to remodel (personal issue vs. “thinking about”)

Interest in your firm

Who else are they interviewing and why?

Decision makers?

Budget reasonable and if not are they willing to revise scope?

“Deal breakers”?

Next steps?

A weathered, rectangular orange sign is mounted on a wooden plank. The sign has a rough, peeling texture with some white paint visible underneath. It is secured with four metal screws. The background consists of several strands of rusty barbed wire and wooden planks, creating a sense of a barrier or a restricted area. The word "BEWARE" is overlaid in large, white, sans-serif capital letters across the center of the sign.

BEWARE

Treated as a commodity-no differentiation

Are they truthful and not holding back/divulging key information

Control issues

Slow to communicate , questions not answered or communications not acknowledged

Little importance to your requests

Body language and tonality show a disinterest or a lack of courtesy

NEXT STEPS & FOLLOW UP

Thank you

Provide additional information

Answer inquiries quickly

Lead commitment deadline is past
send a “close the file email”

No commitment or communication
move on

REFERRALS, TESTIMONIALS, & ADDITIONAL BUSINESS

The right to ask through

Strong relationships and trust

Effective communication

Happy customer

Staying in touch with past clients:

Newsletters

Email

Maintenance-repair check ups

Warranty work

Promotions

New lead visits

Open house for community and professional events

WHAT TO ASK FOR:

Testimonials for social media and marketing materials

Referrals through promotions, branding, marketing, and just asking at any opportunity (good pitch line)

Additional business through effective “touch” campaigns

Scheduled call “check in”

Direct mail

Home maintenance & inspection division

SALES PERSON'S ARSENAL

Marketing & promotional materials

Input sheets and checklists

Client Interview Questions

Questions to ask a client

Primary sensory help guide for visual-auditory-kinesthetic communication

CLIENT BEHAVIORAL DIFFERENCES (DISC)

What do the letters mean?



Dominance

Emphasis on shaping the environment by overcoming opposition to accomplish results

Priorities

Getting immediate results
Taking action
Challenging self and others



Influence

Emphasis on shaping the environment by influencing or persuading others

Motivated by

Social recognition
Disapproval
Loss of influence
Being ignored



Steadiness

Emphasis on cooperating with others within existing circumstances to carry out the task

You will notice

Patience
Team person
Calm approach
Good listener
Humility



Conscientiousness

Emphasis on working conscientiously within existing circumstances to ensure quality and accuracy

Fears

Social criticism
Slipshod methods
Being wrong

FINAL NOTE:

Continue to market to
your lost leads

Have a system in place

BILL SHAW
WM. SHAW & ASSOCIATES



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