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

- Production
- Sales
- Marketing & Advertising
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
METHODODOLOGY 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
<table>
<thead>
<tr>
<th>Call Date</th>
<th>Call Return</th>
<th>Client Type</th>
<th>Lead Outcome</th>
<th>Reason for Outcome</th>
</tr>
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</table>

**Lead Sources**

**Referred By:**

**Name:**

**Spouse:**

**Address:**

**Zip:**

**JobSite:**

**Home Phone:**

**His Office:**

**Cell:**

**E-mail:**

**Her Office:**

**Cell:**

**E-mail:**

**Project Description:**

1. Who are all the decision makers?

2. Have you remodeled in the past? Yes No

3. How was that experience?

4. Have you already worked with a professional designer/architect on this project? Yes No

5. Are you interviewing other remodeling firms? Yes No

Which ones?

6. Do you have a time frame or constraints that you need to meet? Yes No

Start date: ___________________ End date: ___________________

7. Are you working with a specific budget? Yes No

Approximate amount: ___________________

8. How will the project be funded?

9. How long have you considered this project?

10. What year was your house built? How long have you owned your home? Future Commitment

**Initial Appointment:**

**Date:**

**Time:**

**Remodel:**

**Design:**

**Outsource:**

**Personal Information:**

**Occupations (Mr.):**

**Children (Names/Ages):**

**Personal Notes, Interests & Fears:**

**Core Issues/Needs:**

**Data Entry:**

Client Info: Appt: ___________ Brochure/NotePad: ___________
QUALIFIEDOR 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?
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
REFFERALS, 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?

<table>
<thead>
<tr>
<th>Dominance</th>
<th>Priorities</th>
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<tbody>
<tr>
<td>Emphasis on shaping the environment by overcoming opposition to accomplish results</td>
<td>Getting immediate results</td>
</tr>
<tr>
<td></td>
<td>Taking action</td>
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<td></td>
<td>Challenging self and others</td>
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<table>
<thead>
<tr>
<th>Influence</th>
<th>Motivated by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emphasis on shaping the environment by influencing or persuading others</td>
<td>Social recognition</td>
</tr>
<tr>
<td></td>
<td>Disapproval</td>
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<tr>
<td></td>
<td>Loss of influence</td>
</tr>
<tr>
<td></td>
<td>Being ignored</td>
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<table>
<thead>
<tr>
<th>Steadiness</th>
<th>You will notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emphasis on cooperating with others within existing circumstances to carry out the task</td>
<td>Patience</td>
</tr>
<tr>
<td></td>
<td>Team person</td>
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<tr>
<td></td>
<td>Calm approach</td>
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<tr>
<td></td>
<td>Good listener</td>
</tr>
<tr>
<td></td>
<td>Humility</td>
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<table>
<thead>
<tr>
<th>Conscientiousness</th>
<th>Fears</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emphasis on working conscientiously within existing circumstances to ensure quality and accuracy</td>
<td>Social criticism</td>
</tr>
<tr>
<td></td>
<td>Slipsided methods</td>
</tr>
<tr>
<td></td>
<td>Being wrong</td>
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FINAL NOTE:

Continue to market to your lost leads

Have a system in place