

# ***MILLION DOLLAR TRADIE SALES BOOTCAMP***



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# How To Attend a One-Day Intensive

The average (growing) Plumber or Electrician spends \$958 a year on some form of self-improvement. Seminars, books, CD's, DVD's, Software systems or courses to make themselves better people and better business people, in short: to make more money.

Seminars and courses are the best opportunities because they're live performances. They offer "in your face" information that is timely—which makes you evaluate the information in terms of what you are doing "right now".

Business people go to live seminars eager to get more information, but few know how to attend for maximum benefit. Here are few guidelines and ideas I've compiled from both seminar leaders and seminar attendees - These tips will ensure you walk away with the gold:

1. Lower your sensitivity meter - or better yet, turn it off. You're here to get information not be offended by a remark or word.
2. Self-evaluate it, don't "I know it". When you hear a fact that will make you better, don't tell yourself "I know that" rather ask yourself, "how good am I at that?" Self-evaluation is the only way to get better.
3. Search for idea-gold. Look for what you don't know - not what you do know. Try to walk away with 6 things you can use tomorrow.
4. Listen with the intent to understand. Don't cut off the thought too soon. Stick with it...listen all the way out. Don't be smarter than the presenter - just listen with the intent to learn and get better.
5. Don't do it like they do it. Do it like you do it. Adapt the seminar leader's concepts and words to your personality and style.
6. Ask anything any time. Challenge anything any time. If you don't understand, ask why. Write down questions as they occur to you and ask them at the first appropriate moment.
7. All information won't work all of the time. So what? Pick out what WILL work and concentrate on that.
8. Take the general information and adapt it to your situation. Think, "how will this work in my business?" Try to adapt the principle as soon as you hear it.
9. Don't criticise the presenter - instead listen for the one or two gems that may impact you forever.
10. Your objective is to make yourself better. That's why you came in the first place. Don't strut what you already know. Find the "BFOs (Blinding Flashes of the Obvious)" and convert them to your world. Leave with new things that will help you, not the same information you came with.
11. Sit with someone you don't know -Stay away from the people you came with. Make new friends. Look for a potential new customer or contact.
12. Take great notes and record them at the end of the event. Too many times great ideas go fallow before they have a chance to be implemented. All great seminar ideas fall victim to the every day work that awaits you after the event. If you record your notes and listen to them every day for two weeks, you are more likely to do the things you would have put off for a month, maybe forever.

# Notes

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## MODULE 1 SALES PSYCHOLOGY



# SALES BOOTCAMP



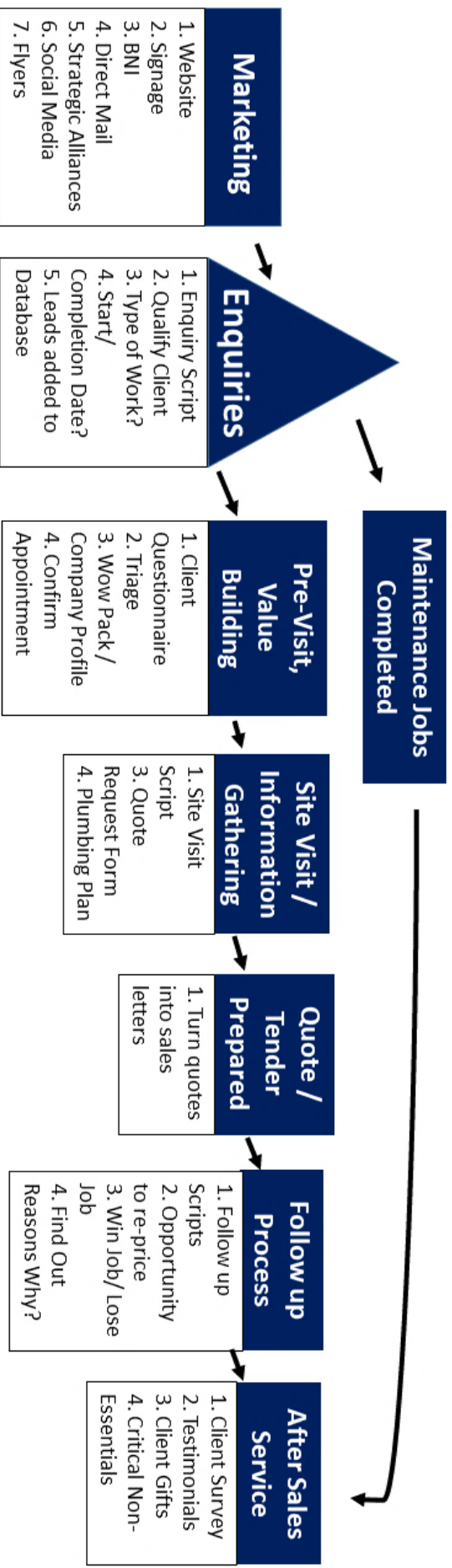






# Sales Process Map

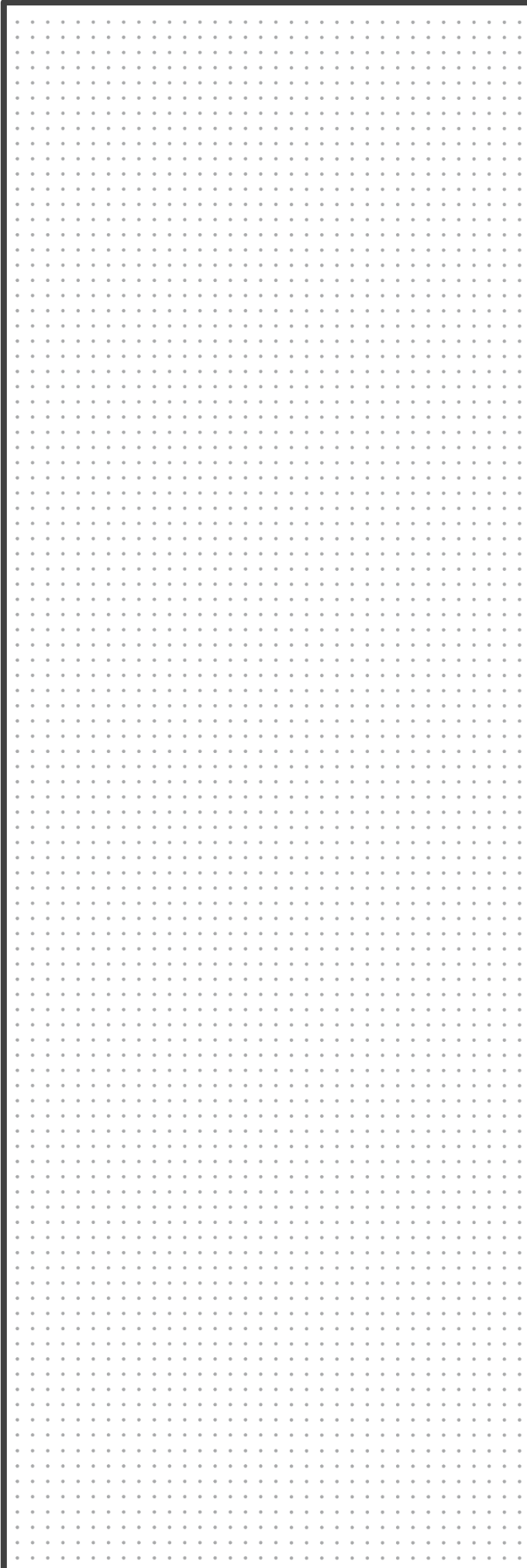
## Sales Process Map





# Notes





## Action Steps

## Backburners

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## MODULE 2 FIRST IMPRESSIONS



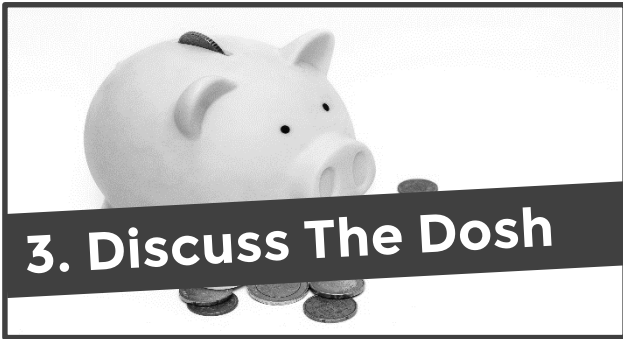
## SALES BOOTCAMP



**1. Smile**



**2. Play The Long Game**



**3. Discuss The Dosh**



**4. Seed The Sale**



**5. Be Prepared**





# Enquiry Script Blueprint

## Greeting

(Warm and welcoming)



## Job Details

(Ensure you have all relevant job details so Tradesman knows what to expect, including property access details)



## Site Visits

(Outline next steps for site visit to quote larger jobs)



## Take Control

(Set the agenda and be in control)



## Marketing Opportunities

(Seed future work opportunities)



## Frequently Asked Questions

(Ensure team has prepared answers to all FAQs & answers are understood and practised)



## Confirm / Gather Details

(Personal details are crucial for doing the job accurately and to build your customer database)



## Qualify & Get Agreement

(Ensure client can and will pay and get agreement upfront on payment methods and conditions)



## Close

(Finish the call with energy...)



# Enquiry Script

## Enquiry Script / Sheet

Job Enquiry Form

Date: / /

Time: \_\_\_\_\_

☺ SMILE BEFORE PICKING UP RECEIVER (Answer after 3 rings)

***Good Morning/Afternoon welcome to XYZ Plumbing, you're speaking with (your name)***

.....

***Just so I can help you best can I ask you a couple of quick questions...?***

***Have we helped you before?***

**NO - NEW CUSTOMER**

**YES – RECORD AS EXISTING CUSTOMER**

***Can I get some details please?***

***Can I confirm your details?***

Name: \_\_\_\_\_

Are you a Business? \_\_\_\_\_

Property Address: \_\_\_\_\_

Ph: \_\_\_\_\_

Mobile: \_\_\_\_\_

Email: \_\_\_\_\_

***Do you own the Property (or have authority to authorise this work?) Y / N***

***Can I ask how you heard about us? (Circle)***

- |   |   |
|---|---|
| <input type="checkbox"/> Ad Words             | <input type="checkbox"/> Google Search  |
| <input type="checkbox"/> Website              | <input type="checkbox"/> Yellow Pages   |
| <input type="checkbox"/> Yellow On-Line       | <input type="checkbox"/> Builders Crack |
| <input type="checkbox"/> Suppliers (Merchant) | <input type="checkbox"/> Face Book      |
| <input type="checkbox"/> Email Marketing      | <input type="checkbox"/> Signage        |
| <input type="checkbox"/> BNI                  | <input type="checkbox"/> Flyers         |

Other: \_\_\_\_\_

***How can we help you today? (get as many details as possible – including property access details.)***

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(Check in schedule and book a suitable time for the job or onsite visit (see script for large jobs)

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Who: \_\_\_\_\_ (enter in Job Management System)

# Enquiry Script

*Do you own any other properties? Y / N (would you like our director John to contact you and discuss our VIP program for Property Investors?) Y / N*

*(name) as part of our service the team will also conduct a Free XX Point (Plumbing / Electrical) safety inspection whilst on site.*

*So (name) our service fee is \$150 Incl. GST. That covers us getting to site, the first 30 minutes of labour, doesn't include any materials and we take payment on completion. (Discuss other fees as appropriate e.g. Urgent / After Hours call out)*

**Are you ok with that?**

*(If not an Account Holder) How would you like to pay for the job?*

*You can pay via Credit Card or Open an Account and pay by internet banking.*

*What would work best for you?*

*To secure your booking we'll grab a copy of your credit card details. We'll send you an invoice once the job is completed. If we don't hear from you or receive payment via internet banking, we'll process payment on the credit card the following day.*

**Are you ok with that?**

Visa / Mastercard # \_\_\_\_\_

Name on Card \_\_\_\_\_

Expiry Date \_\_\_\_ / \_\_\_\_

CSV \_\_\_\_\_

*If opening an account... Cool, we'll send you a copy of our terms and conditions via email now. Please sign the terms online to confirm your job. Is that OK?*

## **If a job that requires a site / sales appointment...**

The next step is to schedule an onsite meeting with our Estimator (name). (Name) has some time available on \_\_\_\_\_ or \_\_\_\_\_ (give two options for the client to choose from that fit with default diary). What time works best for you?

(Name) will give you a call prior to coming to ask you a few more details about what you're after so he's prepared.

I am going to send you out an information pack and a questionnaire, what is the best address to send it to (Name)? I'll also email the questionnaire and confirmation of appointment, is (address given) the best one to send that to?

Thanks, (Name) will give you a call once we have received your questionnaire to discuss your project further. What is the best number to contact you on? .....

## **Close...**

*Great (name of Tradesman/ Estimator) will see you at (time) on (date) at (address).*

*Is there anything else we can help you with?*

*Have a great day☺*

# Frequently Asked Questions

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### Frequently Asked Questions for Handling Enquiries

The purpose of the question handling scripts is to give you ready made answers to deal with tricky questions so you have the best opportunity of making an appointment.

#### **So how much does it cost or what is your hourly rate?**

*The key here is to never give the hourly rate or cost over the phone as these callers are simply ringing around (price shoppers) and we are unlikely to hear back from them. The best response is to give a price range and then look to book the appointment on site.*

#### **An example:**

Caller: So how much does it cost to get a hot water cylinder replaced?

(Name) we are happy to give you a price. The price will range from \$900 to \$2000 and it depends on what sort and size of cylinder you would like and how easy the access is for us to do when we get to your place. How does that sound to you? Great, what I suggest is we book a time for one of our tradesmen to come and do the job (or to give you a firm quote). (Name of Tradesman / or salesperson) is available on Tuesday afternoon or Wednesday morning. What time would work best for you?

#### **Can you give me a quote?**

*It takes too much time to do a quote for the small jobs. We give an estimate (range of price) over the phone and then look to book the appointment on site.*

#### **An example:**

Caller: I would like you to do a quote please?

Yes we are happy to give you an estimate over the phone. Based on what you have told me the job would range from \$200-\$350 but we won't know the exact cost until we get on site and see what the situation is. How does that sound to you? Great, what I suggest is we book a time for one of our tradesmen to come and do the job. (Name of Tradesman) is available on Tuesday afternoon or Wednesday morning. What time would work best for you?

# Frequently Asked Questions

## PROFITABLE TRADIE.

### **The caller asks a question that you cannot answer**

*The key here is to ensure you get the contact details and as much information about the problem as possible. Then we can either book a tradesman to visit or call back when we have found the information we require.*

#### **An example**

Caller asks a question you don't know the answer to.

Ok (Name). What can you tell me about the problem? Let the caller explain and ask questions if necessary (e.g. how long has this been going on? Have you had any work done recently? How old is the piece of equipment? Etc.).

Ok (Name). It sounds like it could be (this) or possibly (that).

What I suggest is we book a time for one of our tradesmen to come and have a look and fix the problem. (Name of Tradesman) is available on Tuesday afternoon or Wednesday morning. What time would work best for you?

Or

(Name), I'll have a get some more information on that and I'll give you a call back shortly.

### **Why do you want my credit card details?**

We take your credit card details to secure your booking. Unfortunately, we have been let down by several people who have booked jobs in and then dragged out payment for weeks or months. It takes hours of follow up and we'd rather spend our time helping other people than chasing money.

It's like a hotel asking for your credit card details when you check in.

# Greeting



Smile before picking up receiver (answer on 3 rings)

Good morning / afternoon, welcome to XYZ Plumbing, you're speaking with (your name)

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.



# Control



Just so I can help you best, can I ask you a couple of questions...?

Have we helped you before?

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.

# Gather / confirm details



New customer...

Can I get some details please?

Existing customer...

Can I confirm your details?

Name:

Are you a business?

Property Address:

Ph:

Mobile:

Email:

Do you own the property (or have authority to authorise this work?)

Notes

A large rectangular area filled with a grid of small dots, intended for handwritten notes.

# Job details



How can we help you today? (get as much detail as possible - including property access details)

Check in schedule and book a suitable time for the job or onsite visit (see script for large jobs)

Date:

Time:

Who:

Enter into Job Management System.

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.

# Marketing Opportunities



Do you own any other properties?

If yes...

Would you like our director John to contact you and discuss our VIP program for Property Investors?

[Name] as part of our service the team will also conduct a Free XX Point (Plumbing / Electrical) safety inspection whilst on site.

Notes

A large rectangular area filled with a grid of small dots, intended for handwritten notes.

# Qualify & Get Agreement



So [Name], our service fee is \$150 Incl. GST. That covers us getting to site, the first 30 mins of labour, doesn't include any materials and we take payment on completion.

If yes...  
(Discuss other fees as appropriate e.g. Urgent / After Hours call out)

Are you okay with that?

If not an Account Holder...

How would you like to pay for the job?

You can pay via credit card or open an account and pay by internet banking.

What would work best for you?

To secure your booking we'll grab a copy of your credit card details. We'll send you an invoice once the job is completed. If we don't hear from you or receive payment via internet banking, we'll process payment on the credit card the following day.

Are you okay with that?

If they want to open an account...

Cool, we'll send you a copy of our terms and conditions via email now. Please sign the terms online to confirm your job. Is that OK?

Notes

A large area of dotted lines for taking notes.

# Site Visits



If it's a job that requires a site / sales appointment...

The next step is to schedule an onsite meeting with our Estimator (name).

(Name) has some time available on...

(Give two options for the client to choose from that fit with default diary)

What time works best for you?

(Name) will give you a call prior to coming, to ask you a few more details about what you're after so he's prepared.

I'm going to send you out an information pack and a questionnaire. What is the best address to send it to [Name]? I'll also email the questionnaire and confirmation of appointment. Is (email address given) the best one to send that to?

Thanks, John will give you a call once we have received your questionnaire to discuss your project further. What is the best number to contact you on?

Notes

A large rectangular area filled with a grid of small dots, intended for handwritten notes.



# Frequently Asked Questions



Create a list of frequently asked questions and ensure your receptionist has learnt and understood how to answer.

Notes

A large rectangular area filled with a grid of small dots, intended for writing notes.

Close



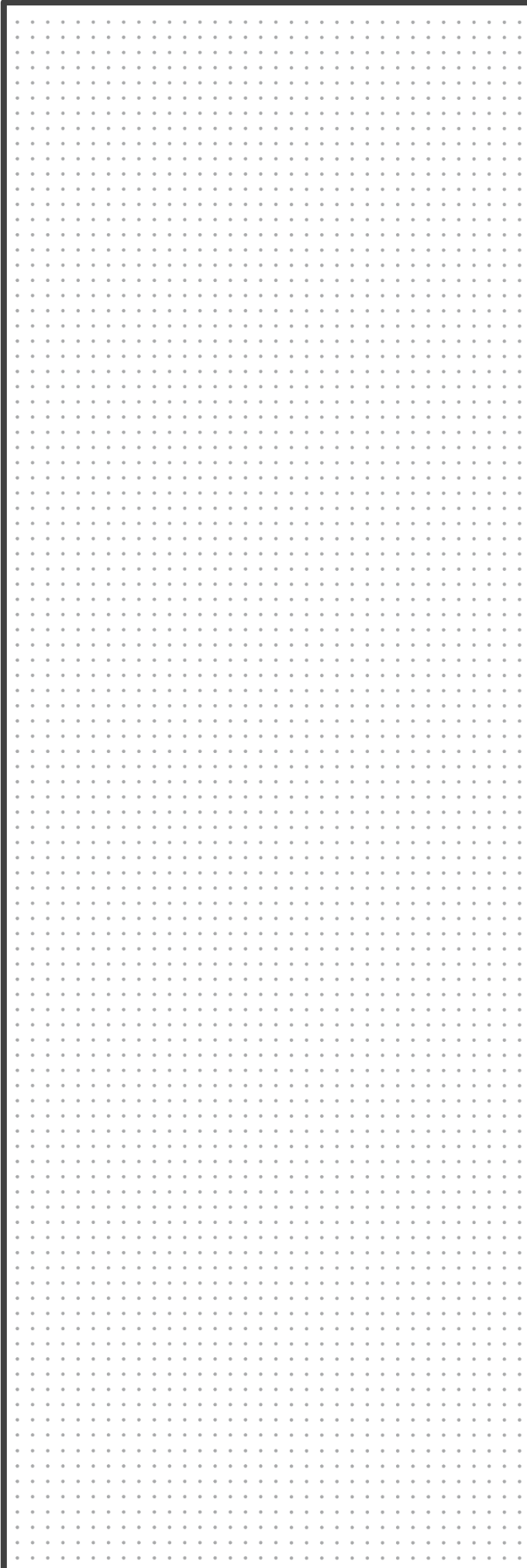
Great (name of Tradesman / Estimator) will see you at (time) on (date) at (address).

Is there anything else we can help you with?

Have a great day 😊

Notes

A large rectangular area filled with a grid of small dots, intended for handwritten notes.



## Action Steps



## Backburners

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## MODULE 3 CLIENT OF THE QUARTER



# SALES BOOTCAMP





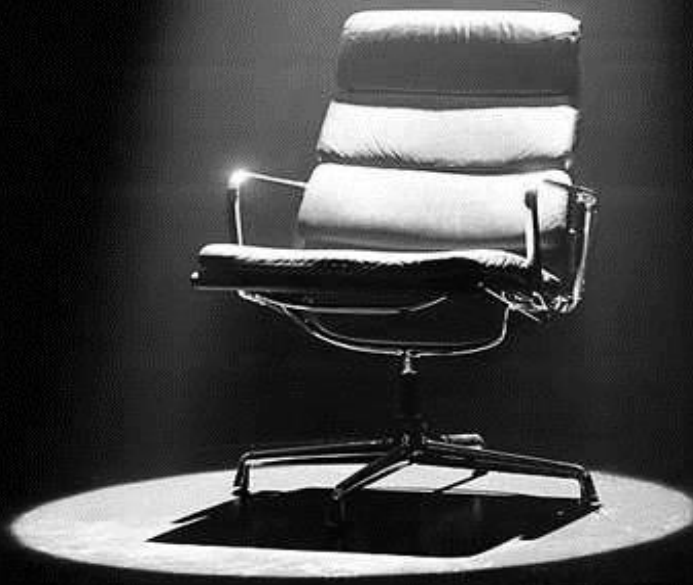




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## MODULE 4 MASTERMIND



## SALES BOOTCAMP

# The Mastermind

*My business challenge is...*

*My specific question is...*

**Notes**

*Action & Insights...*

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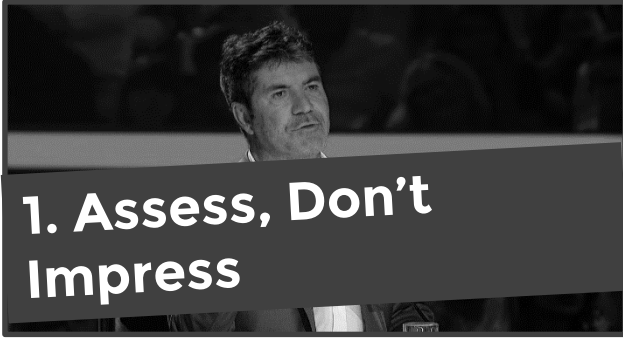
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## MODULE 5 TRIAGE



# SALES BOOTCAMP



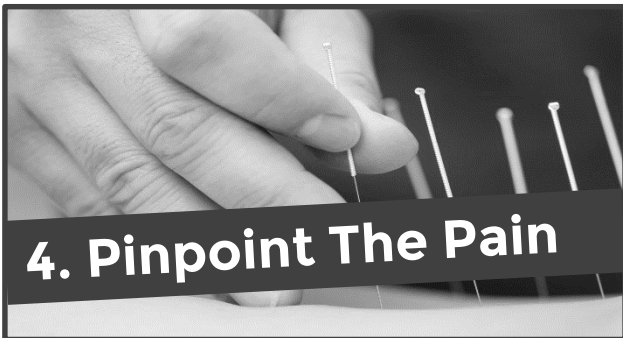
**1. Assess, Don't Impress**



**2. Qualify!**



**3. Go Deep Fast**











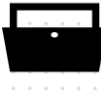
**4. Pinpoint The Pain**



**5. Show Them The Door**



# Triage Script Blueprint

 <p>Opening - Rapport &amp; Control</p>	 <p>Why Now?</p>	 <p>Tell Us About Your Situation</p>
<p>Widen The Gap</p> 	<p>Missing Or Broken?</p> 	<p>What Do You Need?</p> 
<p>Later Or Sooner?</p> 	<p>Problem Check-In / Qualification</p> 	<p>Fit Or No Fit?</p> 

# Triage Script

<b>Triage Call Notes</b>	NAME:	DATE: / /																
	ADDRESS:																	
	PHONE #:																	
<b>1. Opener - Start Strong – control the process (not the person), qualify in/out, build trust fast</b>		<b>1 Minute</b>																
<p>Hi....., it's <b>Tony</b> here from <b>XYZ Plumbing / Electrical</b>. How are you today? I've got a note that you called about getting a _____ (name the product service eg. Heat pump, new Bathroom, heater etc.) I wanted to give you a quick call about your project. I've got 5 minutes to talk is it a good time now? .....I'll just ask you a few questions to figure out if or how I can help you the best. If I can't I'll let you know politely and I'll try and point you in the right direction. If I feel we can help, we'll organise a time to visit and go through things in detail. Is that OK?</p>																		
<b>2. Two big questions - Why Now – why us?</b>		<b>1 Minute</b>																
<p>Ok, let's get started. ....what makes NOW a good time to look at (insert project / service here e.g. getting an Air Con Unit, Heat Pump, Gas Fire, New bathroom etc.) (minimal encourages)</p>																		
<b>3. Tell me a little about your situation e.g. Family, House / Building (style, age, condition)...?</b>		<b>2 Minute</b>																
<p>Tell me a little about your situation. Do you have family? How long have you owned the property? What age / condition / style is your house / building / premises?</p>																		
<b>4. Widen the gap – Ok.... Time to focus on your Pain Points – e.g. Too hot / cold / damp / house proud /</b>		<b>1 Minute</b>																
<p>Ok, let's look at what you're hoping to achieve here. What's the situation now and what do you want when the (project name) is installed / finished?</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:50%; text-align:center;">Now</th> <th style="width:50%; text-align:center;">Project Complete</th> </tr> </thead> <tbody> <tr><td>Hot</td><td></td></tr> <tr><td>Cold</td><td></td></tr> <tr><td>Damp</td><td></td></tr> <tr><td>House Proud?</td><td></td></tr> <tr><td>Electricity Bill?</td><td></td></tr> <tr><td>Space / Room?</td><td></td></tr> <tr><td>Other Categories as necessary</td><td></td></tr> </tbody> </table>			Now	Project Complete	Hot		Cold		Damp		House Proud?		Electricity Bill?		Space / Room?		Other Categories as necessary	
Now	Project Complete																	
Hot																		
Cold																		
Damp																		
House Proud?																		
Electricity Bill?																		
Space / Room?																		
Other Categories as necessary																		
<b>5. If you look at your situation what's missing or broken right now? How is that affecting you? (probe for pain)</b>		<b>1 minute</b>																
<p><b>6. What do you need from us?</b></p>																		
<b>7. Is this a later or a sooner thing for you?</b>		<b>20 seconds</b>																
Now?	Later?																	
<p>When are you hoping to have the (project name) completed?</p>																		



# Triage Script

## 8. Problem Check In ... Feed it back from sections 4, 5, and 6

**1 Minute**

So let me check I've got this right...

You really want a bathroom that is stylish and roomy rather than cramped and dated?  
 You want to keep your house dry and warm rather than have is cold and damp as it is right now?  
 You're keen to keep the house cool during the summer so you and the family can relax and sleep better?  
 Etc...

Is that right?

I have a couple of questions for you...(important qualification questions)

1. What options have you looked at so far?
2. Is there anything that you've seen that you like?
3. How many people have you had look at the job?
4. Just so we can help best what are hoping to spend on the (project name)?
5. Have you got finance organised?

## 9. Open the door – Fit or no fit

**2 Minutes**

I said at the start my job today was to ask you a bunch of questions to see IF or HOW I can help. I promised if we couldn't, I'd let you know politely and try to **point you in the right direction**. And I said, if we could, we'd book in another time to talk about how.

**No Fit** – Now that I know more about what you're after, I don't think we're the right people to help you. We do our best work with (e.g. homeowners rather than commercial clients etc.). I know someone who I could put you in touch with if you'd like. Thanks for your enquiry. Have a great day.

**Fit** - So the good news is, (product / project name) is our bread and butter. So, the next step is for us is to get together and talk through the options in detail.

It'll take around 30 minutes and we'll look at 3 things:

1. The result you're after and how that will improve your house / building / premises and quality of life for your family / employees etc;
2. We'll look at what you've got right now on site so I know what we've got to work with;
3. Work out which options will work best for you and if you're happy we'll organise a plan to get the job done for you and book you in.

Are you comfortable with that?

Great, Have you got your **diary handy**? I've got 2 slots available next week, either ..... or .....

Is there **anyone else**, other than yourself is involved in the decision making process? (Great what do we need to do to get them along to the session?)

Can I confirm the address with you please.....?

My Office Manager (Name) will send you a **confirmation email**, is the best email address.....

### *Optional for Larger Jobs*

*We will also courier you an information pack. What's the best address to courier that to.....? Have a look through it before we meet. There are a bunch of great suggestions and options in there for you to choose from.*

So, it's been great talking today and getting to know you. I've got a bunch of notes here so when we talk next we can just pick up where we left off. Is that cool with you? OK, great, I look forward to seeing you on..... at .....

### **Post Call Process**

1. Send confirmation email to client
2. Courier info pack to client
3. Scan notes and attach to client's file

	<b>Check:</b>
	<b>Check:</b>

# Opening - Rapport & Control



Hi (name), it's Tony here from XYZ  
Plumbing / Electrical. How are you  
today?

I've got a note that you called about  
getting a (project name e.g. heat pump,  
bathroom etc.)

I wanted to give you a quick call about  
your project. I've got 5 minutes to talk is  
it a good time now?

(Name), I'll just ask you a few questions  
to figure out if or how I can help you the  
best. If I can't I'll let you know politely  
and I'll try and point you in the right  
direction. If I feel we can help, we'll  
organise a time to visit and go through  
things in detail. Is that OK?

Notes

A large area of dotted lines for taking notes.

# Why NOW?



OK, let's get started...

Use minimal encourages...

What makes NOW a good time to look at  
(project name)...?

Notes

A large rectangular area filled with a grid of small, evenly spaced dots, intended for taking notes.

# Tell Us About Your Situation



Tell me a little bit about your situation...

Do you have family?

How long have you owned the property?

What age / condition / style is your house / building / premises?

Notes

A large rectangular area filled with a grid of small dots, intended for handwritten notes.

# Widen The Gap



OK, let's look at what you're hoping to achieve here...

What's the situation now and what do you want when the (project name) is finished?

Hot?

Cold?

Damp?

House proud?

Electricity bill?

Space / room?

Other categories as necessary.

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.

# Missing Or Broken?



If you look at your situation, what's missing or broken right now?

How is that affecting you?

Probe for pain...

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.



# What Do You Need?



What do you need from us?

Notes

A large rectangular area filled with a grid of small, evenly spaced dots, intended for taking notes.

# Later Or Sooner?



Is this a later or a sooner thing for you?

When are you hoping to have the  
(project name) completed?

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.

# Problem Check-In / Qualification



So let me check I've got this right...

Feed it back from sections 4, 5 & 6...

For example...

You really want a bathroom that's stylish and roomy rather than cramped and dated?

You want to keep your house dry and warm rather than have it cold and as it is right now?

You're keen to keep the house cool during the summer so the family can relax and sleep better?

Is that right?

I have a couple of questions for you...

What options have you looked at so far?

Is there anything else that you've seen that you like?

How many people have you had look at the job?

Just so we can help best, what are you hoping to spend on the (project name)?

Have you got finance organised?

Notes

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# Fit Or No Fit?



I said at the start my job today was to ask you a bunch of questions to see IF or HOW I can help. I promised if we couldn't, I'd let you know politely and try to point you in the right direction. And I said, if we could, we'd book in another time to talk about how.

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2. We'll look at what you've got right now on site so I know what we've got to work with.

3. Work out which options will work best for you and if you're happy we'll organise a plan to get the job done for you and book you in.

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Great, have you got your diary handy? I've got 2 slots available next week, either ... or ...

Is there anyone else, other than yourself, involved in the decision making process? (Great, what do we need to do to get them along to the meeting?)

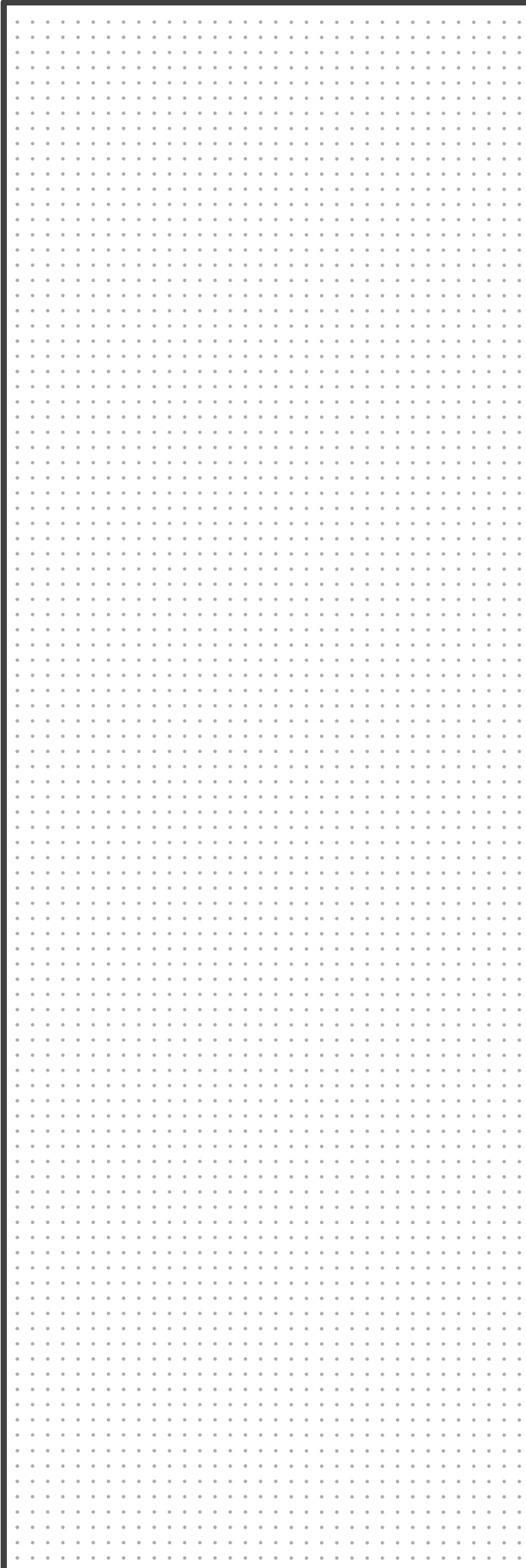
Can I confirm the address with you please...?

My Office Manager (name) will send you a confirmation email, is the best email address...?

So it's been great talking today and getting to know you. I've got a bunch of notes here so when we talk next we can just pick up where we left off. Is that cool with you? OK, great, I look forward to seeing you on (date) at (location).

Notes

A large rectangular area with a light gray background and a grid of small dots, intended for taking notes.



## Action Steps

## Backburners

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## MODULE 6 SALES MEETING MASTERY



## SALES BOOTCAMP



## Notes




**1. Audit Your Performance**



**2. Look Upstream**



**3. Watch Your Language**




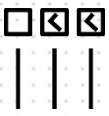







**4. Intention Beats Perfection**



**5. Ask For The Sale**



# Sales Meeting Blueprint

<p><b>Rapport</b></p> 	<p><b>Agenda (Take Control)</b></p> 	<p><b>Decision (Why Now?)</b></p> 
<p><b>Result (Ideal Result)</b></p> 	<p><b>Reality (Problem)</b></p> 	<p><b>Roadblocks (Obstacles To Buying)</b></p> 
<p><b>Value</b></p> 	<p><b>Check-In Questions</b></p> 	<p><b>Magic Pills (Close &amp; Next Steps)</b></p> 

# Sales Meeting

## 1. Rapport

Introduce yourself (with a big smile)

Best place to park / Business Card etc

Ask them about their cat ☺

Check decision makers are present

## 2. Agenda

Is there somewhere we can sit and talk?

Is it OK if I outline how we'll go through things today?

First, we'll look at what are you wanting to achieve (results)?

Second, I'll ask you about what the situation is right now (reality)?

We can go through any questions you have or things that are holding you up from getting started (roadblocks)?

Then we can talk through how we might be able to help and the next steps from here.

Is that OK?

## 3. Decision

Before we get started, I'm curious...Why is now a good time to look at (project name e.g. renovating your bathroom / installing a heat pump / air conditioner / central heating system)?

Is this a later or a sooner thing?

Is there a specific date you're working to or is just the sooner the better?

## 4. Result

Ok, let's get started. Once you have the (project name) finished / installed what are you hoping that will give you?

*Use minimal encourages...*

What will that give you?

How will it help your family / lifestyle / property?

I feel like I've got a good handle on what you want so let's switch gears and talk about the situation right now. Is that OK?

## 5. Reality

What's the situation now that means you want to (project name)?

*Use minimal encourages... and probe for pain...*

What are you not happy with?

How is this affecting you / family / children / property / bank accounts etc.?

# Sales Meeting

How do you feel about...?

What impact is that having...?

Can you show me around the house / bathroom / site?

*Walk through the house / site & inspect / measure up*

I feel like I've got a handle on what you want and how it is right now, let's switch gears and talk about any roadblocks. Is that ok?

## 6. Roadblocks

Have you got any questions or things that are holding you up from getting the (project name) started / installed?

Are there any options you've looked at already that you like (*talked with other providers / confused about what option to go with*)?

Do you have plans drawn up?

Have you applied for consent?

Have you organised finance?

Just so I can give you the best options what is your budget for the (project name)?

## 7. Value

Ok. Let me make sure I've got this right...

You'd like (Result), but now you've got (Reality), and (Roadblocks) is / are holding you up. Did I miss anything?

Great. I've been asking all the questions and I feel like I've got a good handle on the situation and what you need...

Let's switch around and you be the asker...

Where do you think we should go from here?

## 8. Check-In Questions

*As you go through the Magic Pills ask check-in questions to get agreement.*

Have I got that right?

How does that sound / look / feel?

Are you ok with that?

Does that make sense?

Are you 100% comfortable with everything?

Where do you think we should go from here?

# Sales Meeting

## 9. Magic Pills

Do you mind if we sit down and I can talk you through what I think we could do?

### **Magic Pill #1 Problems**

It sounds like the big problems to solve are....

Your (problem) and it's causing (impacts)...

*For example, ...*

*Your house is cold and damp and the children are getting sick more often and you are taking too many days off work to look after them.*

*Your house is too hot, and its makes it difficult to for the kids to sleep which means everyone is tired and irritable.*

*Your current bathroom is small and crowded which makes getting out the door to school and work in the morning a bottleneck and you can't have a shower when you want to.*

*You have no outdoor entertaining area which means you don't invite friends over and its affecting your social life.*

Check-In Question – Have I got that right?

### **Magic Pill #2 Solutions**

So, what I think you need is...

A (thing) that (benefits)...

*For example, ...*

*A ventilation system that will keep the house dry, allow you to heat the house more easily and stop that mould and mildew that causes the family to get sick more often*

*An air-conditioning system that keeps the house cool, so you can settle the kids to bed and get a decent night's sleep yourselves.*

*A new bathroom set up where we separate the shower, toilet and vanity so that more than one of you can use the bathroom at a time which will speed things up in the morning.*

*Redesign your yard so that you have an outdoor entertaining area that comes off the dining room, that you can use all year around and give you a place you're proud to invite people over to.*

Check-In Question – How does that sound to you?

### **Magic Pill #3 Promise**

Shall we talk about how we could help with your (project name) ...?

From what we've talked about I feel like a good solution would be ...

*Talk through the solution / options / process that you propose.*

# Sales Meeting

*Use visual sales aids where appropriate...before and after photos, brochures of fittings & fixtures etc*

We're a little different from other (industry type e.g. Plumbers / Electricians / Landscapers etc).

*Talk through your point of difference... guarantee, company values, testimonials etc.*

Check-In Questions – Does that all make sense? Are you comfortable with everything? Where do you think we should go from here?

## **Magic Pill #4a Next Steps – Close (if you can price the job then and there)**

So, there are only two things left to go through ... when you'd like the (project name) installed and investment.

Let's talk timing first. Is that ok?

We're pretty booked up over the next few weeks ... but we have a couple of slots available next \_\_\_\_\_ or \_\_\_\_\_. What would work best for you?

In terms of investment the (option / options discussed) we can do for \_\_\_\_\_ (talk through price options if appropriate) and we ask for a 50% deposit to secure your booking.

Are you OK with that?

Great, would you like us to book that in for you now?

If you have any questions between now and when we install the (project name) please give me a call.

## **Magic Pill #4b Next Steps - Close (if you need time to price the job)**

So, the next step is for us to put a proposal together for you with a plan and price. Once you're happy with the proposal we ask for a 50% deposit and book your job in. We'll get that back to you with a proposal by \_\_\_\_\_.

Are you OK with that?

Great. If you do have any questions over the next few days, please give me a call.

I look forward to talking when we have your proposal ready and getting your (project name) sorted for you.



# Rapport



Introduce yourself (with a big smile)

Best place to park / business card etc.

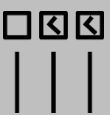
Ask them about their cat 😊

Check decision makers are present.

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.

# Agenda



Is there somewhere we can sit and talk?

Is it OK if I outline how we'll go through things today?

First, we'll look at what you're wanting to achieve (results).

Second, I'll ask you about what the situation is right now (reality).

Then we can go through any questions you have or things that are holding you up from getting started (roadblocks).

Then we can talk through how we might be able to help and the next steps from here.

Is that OK?

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.

# Decision



Before we get started, I'm curious... Why is now a good time to look at (project name e.g. renovating your bathroom / installing a heat pump / air conditioner / central heating system)?

Is this a later or sooner thing?

Is there a specific date you're working to or is just sooner the better?

Notes

A large area of dotted lines for taking notes.

# Result



OK, let's get started. Once you have the (project name) finished / installed, what are you hoping that will give you?

Use minimal encouragements...

What will that give you?

How will it help your family / lifestyle / property?

I feel like I've got a good handle on what you want so let's switch gears and talk about the situation right now. Is that OK?

Notes

A large area of dotted lines for taking notes, consisting of a grid of small dots on a light gray background.

# Reality



What's the situation now that means you want to (project name)?

Use minimal encourages... and probe for pain...

What are you not happy with?

How is this affecting you / family / children / property / bank accounts etc.?

How do you feel about it...?

What impact is that having...?

Can you show me around the house / bathroom / site?

Walk through the house / site & inspect / measure up...

I feel like I've got a handle on what you want and how it is right now, let's switch gears and talk about any roadblocks, Is that OK?

Notes

A large area of dotted lines for taking notes, spanning the width of the page below the questions.

# Roadblocks



Have you got any questions or things that are holding you up from getting the (project name) started / installed?

Are there any options you've looked at already that you like (talked with other providers / confused about what option to go with)?

Do you have plans drawn up?

Have you applied for consent?

Have you organised finance?

Just so I can give you the best options, what is your budget for the (project name)?

Notes

A large area of dotted lines for taking notes, spanning the width of the page below the questions.

# Value



OK. Let me make sure I've got this right...  
You'd like (result), but now you've got  
(reality) and (roadblocks) is / are holding  
you up. Did I miss anything?

Great. I've been asking all the questions  
and I feel like I've got a good handle on  
the situation and what you need...

Let's switch around and you be the  
asker...

Where do you think we should go from  
here?

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.



# Check-In Questions



As you go through the Magic Pills, ask check-in questions to get agreement.

Have I got that right?

How does that sound / look / feel?

Are you OK with that?

Does that makes sense?

Are you 100% comfortable with everything?

Where do you think we should go from here?

Notes

A large rectangular area filled with a grid of small dots, intended for taking notes.

# Magic Pill #1 Problems



Do you mind if we sit down and I can talk  
you through what I think we could do?

It sounds like the big problems to solve  
are...

Your (problem) and it's causing  
(impacts)...

For example...

Your house is cold, damp and the  
children are getting sick more often and  
you are taking too many days off work  
to look after them.

Your house is too hot and it makes it  
difficult for the kids to sleep which  
means everyone is tired and irritable.

Your current bathroom is small and  
crowded which makes getting out the  
door to school and work in the morning a  
bottleneck and you can't have a shower  
when you want to.

You have no outdoor entertaining area  
which means you don't invite friends  
over and it's affecting your social life.

Check-In Question – have I got that  
right?

Notes

A large area of dotted lines for taking notes.

# Magic Pill #2 Solutions



So, what I think you need is...

A (thing) that (benefits)...

For example...

A ventilation systems that will keep the house dry, allows you to heat the house more easily and stop that mould and mildew that causes the family to get sick more often.

An air-conditioning system that keeps the house cool, so you can settle the kids to bed and get a decent night's sleep.

A new bathroom setup where we separate the shower, toilet and vanity so more than one of you can use the bathroom at a time which will speed things up in the morning.

Redesign your yard so that you have an outdoor entertaining area that comes off the dining room, that you can use all year around and give you a place you're proud to invite people over to.

Check-In Question – How does that sound to you?

Notes

A large area of dotted lines for taking notes, spanning the width of the page below the text.

# Magic Pill #3 Promise



Shall we talk about how we could help with your (project name)...

From what we've talked about I feel a good solution would be...

Talk through the solution / options / process that you propose.

Use visual aids where appropriate... before and after photos, brochures of fittings, fixtures etc.

We are a little different from other (industry type e.g. Plumbers / Electricians / Landscapers etc.)

Talk through your point of difference... guarantee, company values, testimonials etc.

Check-In Questions - Does that all make sense? Are you comfortable with everything? Where do you think we should go from here?

Notes

A large area of dotted lines for taking notes.

# Magic Pill #4A Close (if you can price then and there)



So, there are only two things left to go through... when you'd like (project name) installed and investment.

Let's talk timing first. Is that OK?

We're pretty booked up over the next few weeks... but we have a couple of slots available next... or... What would work best for you?

In terms of investment the (option / options discussed) we can do for... (talk through price options if appropriate) and we ask for a 50% deposit to secure your booking.

Are you OK with that?

Great, would you like us to book that in for you now?

If you have any questions between now and when we install the (project name) please give me a call.

Notes

A large dotted grid area for taking notes, consisting of a grid of small black dots on a white background.

# Magic Pill #4B Next Steps - Close (if you need time to price)



So, the next step is for us to put a proposal together for you with a plan and price. Once you're happy with the proposal we ask for a 50% deposit and book your job in. We'll get back to you with a proposal by...

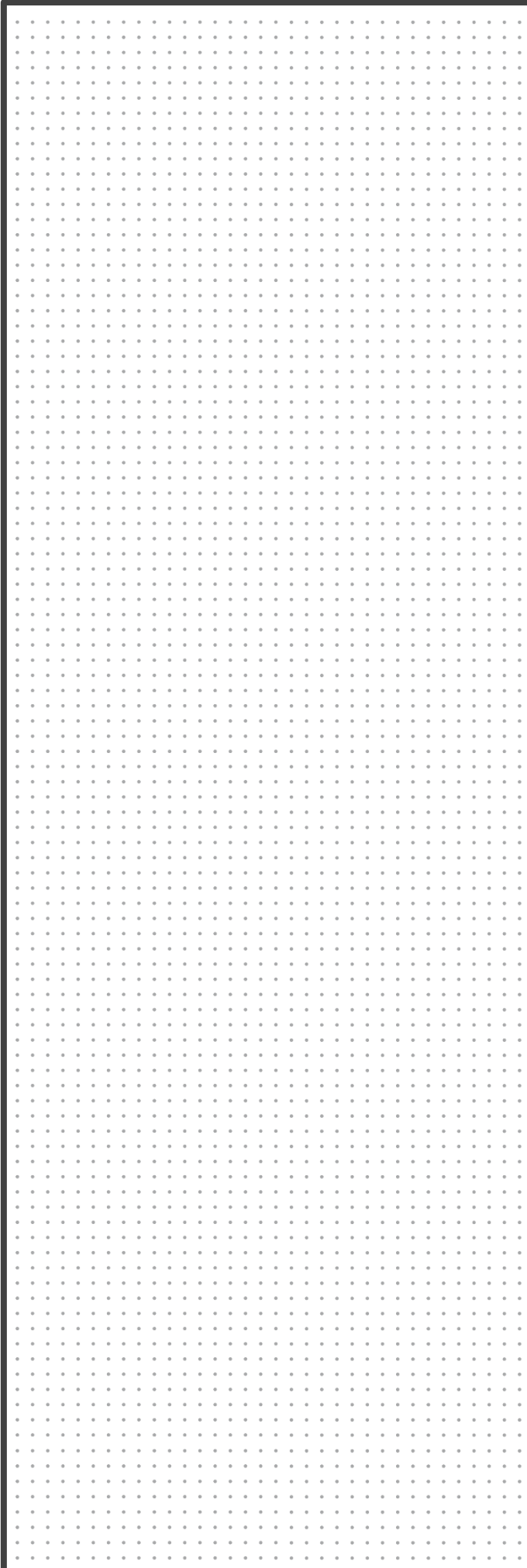
Are you OK with that?

Great. If you do have any questions over the next few days, please give me a call.

I look forward to talking when we have your proposal sorted and getting your (project name) sorted for you.

Notes

A large rectangular area filled with a grid of small dots, intended for handwritten notes.



## Action Steps



## Backburners



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## MODULE 7 TERRY WILLIAMS



# SALES BOOTCAMP



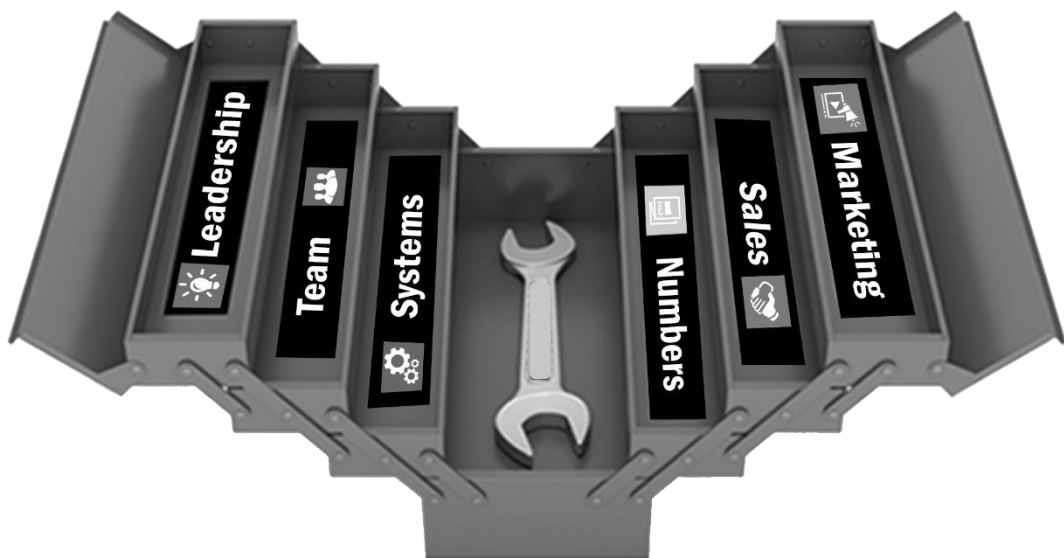




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## MODULE 8 BUILDING YOUR PLAN



## SALES BOOTCAMP





## Marketing

	Start	30 Days	90 Days	1 Year
Choose Niche(s) Market(s) (e.g. Maintenance, High End Homes, HVAC etc.)				
Unique Selling Proposal (USP)				
Customer Database				
Regular Newsletter				
Record Source of Leads				
Marketing 10 x 10 (Marketing Plan)				
Guarantee				
Review / Update Website				
Landing Pages for Website				
Lead Generation Magnet				
Google Ad Words				
On-Line Directories				
Social Media				
Strategic Alliances (Property Managers, Kitchen / Bathroom suppliers etc.)				

Start  
30 Days  
90 Days  
1 Year

Vehicle Signage				
Site Signage				
Building Signage				
Program for Servicing Work				
Flyers				
Marketing Student				
Direct Mail to Niche Markets				
Customer Farming				
Client Surveys				
Plumbing / Electrical Inspection Checklist				
Fridge Magnets				
Switchboard Stickers				
Personal profile				

Start  
30 Days  
90 Days  
1 Year

Map Sales Process				
Test & Measure Conversion Rate				
Sales Scripts				
Phone Scripts				
Enquiry Scripts				
Prospect Questionnaire				
Information "Wow" Pack				
Sales Training				
Set Price Book				
Video and Written Testimonials				
Quotes and Action Plans				
Visual Sales Presentation				
CRM System				
Uniforms				
Autoresponder Sequence				
7 reasons to "Choose Us"				
FAQ's				
Quote Follow Up Scripts				



## Sales



## Systems

Start  
30 Days  
90 Days  
1 Year

### Office

	Start	30 Days	90 Days	1 Year
A to Z of Operations				
Job Management Systems				
Administration manual				
"Cloud" Accounting system				
Code of Conduct				
Email Templates				
Pre-Job Checklists				
Quality Assurance Checklists				
Team Induction Checklist				
Health and Safety Program				

Start  
30 Days  
90 Days  
1 Year

### Onsite

	Start	30 Days	90 Days	1 Year
Equipment / Tool Management System				
Operations Manual				
On-Line Job Cards				
Job cards				
Handover checklist				
Online Job Cards				
Task Analysis (who, what, when)				
Hand Over Checklist				
Sub-Contractor Hand Over Checklist				
Training Videos for Office Process (JING)				

Start  
30 Days  
90 Days  
1 Year



## Team

	Start	30 Days	90 Days	1 Year
Core Values				
Code of Conduct				
Job Descriptions				
Employment Agreements				
KPI's (Key Performance Indicators)				
Hiring Process				
Interview Scripts				
Unique Hiring Proposition				
DISC Profiling				
Vision Statement				
Mission Statement				
Team Culture				
Team Fun Days / Social Club				
Performance Reviews				
Organisational Chart				
Suggestions Box				
Incentive Program				
Job Advertisement				





# Leadership

Start  
30 Days  
90 Days  
1 Year

	Start	30 Days	90 Days	1 Year
Default Diary				
Personal Development				
Delegate and Outsource				
Business Strategy				
Vision Book				
Milestones				
Develop strong leaders				
Business KPI's				
90-day plan				
SMART goals				
Time Productivity				
Scheduling Tools				
Recognise longevity and performance				
Self-Directed Learning				
Implement Staff Suggestions				
80/20 Rule				
Stop-Doing List				
Exit Strategy				



# Numbers

Start  
30 Days  
90 Days  
1 Year

	Start	30 Days	90 Days	1 Year
Price for Profit				
Use Margin not Mark-Up				
Monthly Profit and Loss				
Key Performance Indicators				
Break Even Point (Weekly, Monthly, Yearly)				
Set Minimum Gross Profit Margin				
Cash Flow Forecast				
Sales Budget				
Unit or Set Pricing				
Minimum Service Charge				
Review Pricing Strategy				
Terms of Trade				
Accounts Receivable Process				
Credit Card Payments				
Take Bigger Deposits				
Pay Yourself First				
"Sack" C & D Clients				
Improve Invoicing Time				

# The Project Placemat

Name: \_\_\_\_\_

Date: \_\_\_\_\_

<b>Focus</b>		<b>Vision</b>		<b>Theme</b>		<b>Next Action</b>			
		<div style="border: 1px dashed gray; padding: 10px; text-align: center;"> <p><i>STICK YOUR POST-IT NOTES HERE</i></p> </div>							
<b>Project 1</b>								<b>Project 2</b>	
Name:		Name:		Name:		Date:		Monthly Sales:	
Best Result:		Best Result:		Best Result:		Gross Profit Margin:		Gross Profit Margin:	
Worst Result:		Worst Result:		Worst Result:		Net Profit Margin:		Net Profit Margin:	



