Qualifying the Lead

Getting the Most from the First Contact

Here's the key point: If the customer does not recognize any difference between you and the competition, they will buy on price! The separation from your competition begins with the very first contact the customer has with your company. Here are some ways to set yourself apart:

- ***Have a live body answer the phone…not a machine.***

  We live in the age of electronics. Customers appreciate the sound of a live human voice to talk to when they contact the contractor's office. As consumers ourselves, nothing frustrates us more than calling on a company and having a one-sided conversation with a machine. We learn to live with it if we get a prompt response to our message. But, more often than not, some time will elapse before we can connect with a real person. Meanwhile, the house is an oven because the new AC compressor, which was installed yesterday, has quit working. If prospective clients can connect quickly with a human being rather than an office machine, they feel relieved to pass off their problem to someone responsible. That's why clients hire contractors—to take care of their problems.

- ***Return phone calls promptly.***

  Especially referring to inquiries, many contractors have a procedure to get the information to the appropriate person quickly so that the customer's need to feel important will be satisfied. Salespeople always make an effort to re-connect with the prospect as soon as possible, definitely on the same day of the inquiry. This could mean making a call from home, on the road, or from a pay phone. But you should do it.

- ***Become memorable to the caller.***

  Contractors who have a talent, a new product, or just a creative way to present the same old product, use those things to make the prospect remember them. They are aware, through, that at this time they are only trying to be remembered. They don't expect or try to make the sale over the phone. They save some of the surprises about their firm's capabilities and services for a face-to-face meeting. Ideally, even at the first contact by phone they start to build interest—and through generous feedings at every contact, keep the interest growing until they have the order. Generous displays of enthusiasm, confidence and professionalism are best served up continuously.

What is a Lead Form, and Why Use One?

Successful contractors know they must work only with prospects whose proposed project is the type of work that they can do efficiently and profitably. One of the most important tools is the Lead Form, kept near the phone. This simple form proves its usefulness in the customer qualification process through which all inquiries should pass to prove their value to your company. When properly used, the Lead Form is the script for whoever answers the phone at your company to begin that customer qualification process.

Referring to the sample Lead Form on the following page, notice that all the questions are open-ended so that they can't be answered with a 'yes' or 'no' answer. This will get you more informative answers and help to develop a closer relationship with the caller.

The forms can be printed on colored paper to dramatize their importance and make them harder to misplace. Each phone in the office should have some lead forms nearby. You can make this most even more convenient by having them bound into pads.

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Type of Contact: **Phone Walk-in Home Visit Other DATE & TIME:**

Taken by: A. Answering service? **Yes No** B. Employee? Name:

Customer Name:

Address:

Home Phone: Mr.@ work

Cell Phone: Mrs.@ work

Email address:

(note: ask for e-mail address only casually; say it's for later follow-ups and won't be given out)

Problem or type of work needed:

Specific solution in mind?

Further details of need (probe):

Now I have a few questions that will help us understand your needs and save you time later:

How soon do you want to get this work finished?

How long have you owned your home? **Years: Don't own** (Who is paying for this work?)

Got our name from: **Yellow pages Newspaper TV Radio Telemarketing Mailing Presentation Referral Existing customer Other**

Interested in **cash** or **financing?**

How long have you been considering this work?

How long do you see yourself living in this house?

What research have you done for this project? **other vendors media manufacturer internet**

Are you considering making other improvements to your house? (What?)

Is your house **all-electric** or do you have **gas** also? (What do you use gas for?)

Other problems (NOTE: You can also wait and ask these questions later in the home):
Sometimes understanding the other kinds of problems you have with your house can help us figure out a better solution. Can I run through a short list of common problems with you?

Basic Problems:	Advanced Problems:
Noisy air vents	Soot deposits in the house
Lots of dust	Lingering allergy symptoms
Cold air drafts	Respiratory disorders and asthma
Smoky fireplace	Lingering odors
High energy bills in summer	Mold and mildew
High energy bills in winter	Peeling paint
Hot or cold rooms (bad air distribution)	Annoying CO or smoke alarms
Water heating problems (not enough, rusty, etc.)	
Foggy windows	
Stuffy air	Anything else?

Are you aware of any incentives available to pay part of the cost of some energy-saving improvements?
Yes No (We can tell you more about that)

Are you deciding on this work by yourself, or is someone else involved? (Who is that?)

What time: Date: Day: is best for you (and the other decision maker, if possible)?

Salesperson or technician assigned:

Customer Evaluation Score

1. Ability	vague….1	good…2	best……3	Score :
2. Urgency	none…...1	soon….2	ASAP…3	Score :
3. Cycle	impulse..1	weeks...2	months..3	Score :
4. Source	yellow pages…1	job sign…2	repeat/referral.3	Score :
				Total score:

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Using the Lead Form with Callers

This Lead Form provides a script for the phone answerer. Every line on the pre-printed form is an abbreviated prompt. By practicing to develop a conversational style, all the information can usually be recorded on the form as the prompts are followed. As soon as a call is received from a prospective client, the form is used. The prompts might be personalized, as suggested in the following line-by-line analysis.

Contractor-Supplied Entries

- ***Date and Time*:** This line represents the date the call was received and the time of day, which may seem unimportant until the salesperson has trouble reconnecting with the caller. If that is the case, this might give them a clue as to an acceptable time of day to call. For example, if the incoming call was received at 9:30 p.m., the salesperson might feel justified calling this late, even though normally you should never call a client's home after 9 p.m.
- ***Taken by:*** Identify the source of the information. This could be the answering machine if the call came in after hours, or the name of the person who originally handled the call during normal business hours. It's also used to allow the salesperson to review the information on the Lead Form with the person who originally took the call.

Basic Information Questions

- ***Opening Question:*** So that I can clearly see how best we can help you, could I ask you a few questions?
- ***Mr./Mrs./Ms:*** *Identifying* who makes the call might be an indicator of who is the advocate for the work. There will be times when a caller is unwilling to engage in the conversation scripted by the Lead Form. When that happens, it is appropriate to gather as much information as possible during this initial phone interview and later place a follow-up call with the hopes of speaking to another of the decision makers. During the follow-up call, regardless of whether the phone is answered by the original caller or another of the decision makers, review the questions on the Lead Form once more. Ideally it is desirable to speak to all the decision makers at separate times in an effort to determine who the decision maker is, as well as to identify if the caller really is worthy of the investment of time and energy required for a sales call.
- ***Address:*** Including city, state and zip code (and email address if possible) is vital for many different purposes such as finding the project location, accurate estimating of job costs, and future marketing efforts.
- ***Phone:*** The purpose is to get home phones, pagers, cell phones, work phones, etc. for each of the decision makers. Phrasing the question as: "Is there a number where we can reach you at work?" can also sometimes get the name of their employer or business, which can be useful later in establishing common ground.
- ***Type of Work:*** "What type of work were you thinking of doing?" By giving a brief description of the type of project desired, the caller may or may not be identified as a good match for the capabilities or the company. By describing their needs in response to this question the caller may give other useful information about need and urgency.

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- ***How Soon to Start/finish the Work:*** "How soon were you thinking of having the work done?" This open-ended question is designed to elicit information about need and urgency.
- ***How Long Owned Home:*** "How long have you owned your home?" This is an open-ended conversation starter, vital in determining ability to pay. Should the caller indicate that they don't own the home, the evaluation of the lead would change drastically.
- ***Referred By:*** "How did you get our name, Mrs. Buyer?" This open-ended question helps identify common ground. Also it helps analyze the caller's effort to find a source to satisfy their needs. Certain types of prospects come with higher levels of trust in you. A repeat customer typically has the highest level of trust when they call. A referral prospect comes with a lower level of trust than a repeat customer but a higher level of trust than a caller who just found your name in the yellow pages or saw it on a sign.
- ***Interested in Financing_____Cash_____?:*** "Were you thinking of financing the project or paying cash? We do have financing available that might help you to take advantage of the interest deduction on your taxes." This question defines the caller's ability to pay. Research indicates that customers spend *as much as forty percent more money* when the project is financed. Salespeople know that it is often easier to sell a financed job, because the importance of price is diminished when the cost is defined in monthly payments.
- ***How Long Considering This?*** "How long have you been considering this kind of project, Mr. Homeowner?" This information helps determine the need as well as where the caller is in the buying cycle and sheds some light on need and urgency.
- ***How Long Do You See Yourself Living in This House?*** The answer to this question can indicate opportunities for more complete projects with long-term financing. It also allows the caller to look down the road, visualizing the home after the desired improvements are completed. Getting the customer to imagine the end result of the work at this time helps the conversion from imagination to reality. Because of its open-ended nature, this question is also a good conversation stimulator.
- ***What Research Have You Done?*** "What research have you done regarding the project, Mrs. Homeowner?" This question is designed to prompt the homeowner to volunteer information about whether there are other bidders involved without actually asking the question. This wording avoids suggesting a price-based competition, so that higher quality and more complete solutions can be offered—leading to higher energy efficiency and more satisfied customers.

Problem-Description Questions

The list of possible home performance problems is included to help you see whether there may be a need for a broader solution than the homeowner may realize. You will need to experiment with this series of questions to find out whether it is best for you to ask them by phone or wait until the home visit. Either is okay; the important thing is to get the answers. They will be important in your home inspection and further discussions with the customer, and may result in your finding a much better solution and a happier customer, as well as a better project for you.

Even if you prefer to ask these questions at the visit, we suggest leaving them on the lead form as a reminder to the visiting salesperson or technician.

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Interpreting and Using the Lead Form Scores

Using this lead-rating system, the greater the sum of the four scores, the more desirable the lead. The best lead would have a total score of 12. In order to track the success of the lead production efforts of the company, the number of leads a salesperson receives can be tracked. The lead that creates each sale is attached to the cost estimate when the job is sold. The totals of 'Production per Lead' (PPL) are then computed and tracked for each salesperson.

Using the Lead Form in the Sales Effort

- Naturally, your promise of a fast follow up call by someone who can schedule a visit (if the initial phone answerer can't do it) is very important and must be kept!
- The lead form should become the first item in your sales lead file (and later job file), so that its information can be used by anyone in your company who makes further contact with the customer.
- It is a valuable reference for anyone deciding on which leads to follow up first, calling to schedule an appointment, and preparing for all appointments.
- It should be taken to all appointments, and further notes should be added as more information is gained.
- The lead form allows all your people to be more efficient, more respectful of the customer's time, and better able to impress customers with their familiarity, interest, and competence.

Portions of this Lead Form were taken from the book;
*If I **Sell** You I Have a Job,*
*If I **Serve** You I Create a Career!*
The author, Mike Gorman delivers seminars and provides telephone and on-site coaching with clients ranging from Fortune 500 companies to individual contractors regarding sales, marketing, estimating, lead carpenter, as well as systematizing the business. His background as a "Big 50" and "Top 500" remodeler provides his platform. Mike speaks from proven experience, he is not a theorist. His recent book whose title appears above has filled a void in sales training for remodelers and custom home builders. When you decide that you don't want to be working as hard in five years as you do now, or for questions about coaching, consulting or seminar schedule, email Mike at: mgbok@aol.com, call 1-800-218-5149 or visit his web site at www.techknowledgeonline.net.