

STEP 2—Use a Prospect Capture Form to Get the Right Info

By following a set list of questions on the phone, you can easily and efficiently determine which leads are the ones to hop on ... and which ones to nurture.

You've already read STEP 1 and have been practicing your conversation skills to help make prospects comfortable, gain their trust, and gather crucial information to cultivate a sale. Now read about how to ask the right questions on the phone, and get the information you need to decide which leads are the ones to follow up with first.

STEP 2 in winning the job focuses on how to qualify sales leads. When a prospective customer asks about your services, it's important to have a script of carefully crafted questions. This will help you understand if you have a "hot lead" (someone who is really ready to buy), a "warm lead" (someone who has strong interest but might need additional support to make the decision) or a "cold lead" (someone who has interest, but isn't really in the market for a contractor yet).

Because your resources may be limited, qualifying helps you identify the prospects you should immediately focus on to build sales, and those you should nurture over time.

The *Prospect Capture Form*, the tool that accompanies this article, provides an outline for the type of telephone conversation you should have when the phone rings or when you return phone calls.

Three factors are always required to make any sale: Need, Ability, and Trust. Knowing how to recognize and measure these factors in advance gives you powerful insider information on the likelihood of a sale.

Need— Ask questions that uncover how anxious the prospect is to see a contractor:

- ▶ How severe is the problem?
- ▶ How soon would you like to have the work done?
- ▶ How long have you been considering this project?
- ▶ When is the best time to schedule an appointment?

Ability— Ask questions that help you discover the financial capability of the prospect and their knowledge of the contracting process:

- ▶ How long have you owned your home?
- ▶ What type of similar work have you done on your home in the past?
- ▶ Are you thinking of financing the project or paying cash?

Trust— Ask questions that reveal how the prospect came across the name of your business. Repeat customers or prospects who have been referred to your business will automatically have a higher level of trust in your business than those who just looked your business up online or through a directory.

- ▶ How did you find our name?
- ▶ What research have you done?

Notice that these questions are open-ended and can't be answered by a simple "yes" or "no." By using the accompanying *Prospect Capture Form*, you can get the information you need to focus your time on the customers who are most interested in doing business with you, based on their Need, Ability, and Level of Trust in you.

Use the form as a script to answer the telephone

In addition to using the form with prospects, create a consistent greeting for all incoming calls. This greeting should include your name, company,

and unique selling proposition. That is, what does your company provide that benefits your customers the most? Here's an example: "Good morning, Home Performance Experts, your headquarters for a healthier, more comfortable, and efficient home. This is Barbara."

As soon as it becomes clear that the call is from a prospective customer, use the *Prospect Capture Form* to record information about the prospect, including the date and time they called.

How to handle the topic of budget

Noticeably missing from the form and list of questions is, "How much money are you thinking of spending?" At this point you have established little, if any, trust, which diminishes the validity of answers to budget questions. A caller indicating interest in spending \$12,000 for their project may be just as unrealistic as one who expresses a budget of \$2,000. Until the job has been defined, budget means nothing because no one knows what is necessary or possible.

Try using Part 1 of the accompanying *Prospect Capture Form* a few times. This will help you understand if you need to customize the questions or if there's other information you might want to collect to reflect the needs of your company. Part 2 of the form will be your tool in an upcoming article.

Tool #2: The Prospect Capture Form—Part 1

Part 1 of the *Prospect Capture Form* captures contact information and helps determine your likelihood of closing a sale. It helps you prioritize the lead. Download easy to complete copies of the Prospect Capture Form on the NYSERDA Home Performance Portal dashboard.



Taken by:	Answering service: Yes <input type="checkbox"/> No <input type="checkbox"/>
Time:	Date:
Name: Mr./Mrs./Ms.:	
Address:	
Home Phone:	Mr. @ work:
Cell Phone:	Mrs./Ms. @ work:
Email address—Mr:	Email address—Mrs./Ms.:
Type of Work:	How soon to start work?
How long have you owned the home?	What year was your home built?
Referred by: Yellow pages® <input type="checkbox"/> Newspaper <input type="checkbox"/> TV <input type="checkbox"/> Radio <input type="checkbox"/> Telemarketing <input type="checkbox"/> Mailing <input type="checkbox"/> Referral <input type="checkbox"/> Existing/past Customer <input type="checkbox"/>	
Other:	
Who besides yourself would be involved in the decision making process?	
Interested in: Paying cash <input type="checkbox"/> or Financing <input type="checkbox"/>	
Best time for an appointment?	What remodeling have you done before?
How long have you been considering remodeling?	How soon do you want the work completed?
How long do you see yourself living in this house?	Do you have a specific solution in mind?
What research have you done?	Other vendors <input type="checkbox"/> Media <input type="checkbox"/> Internet <input type="checkbox"/> Manufacturer <input type="checkbox"/>
Are you considering other improvements to your home?	If so, what types of improvements?
Do you have other problems with your house?	
Sometimes understanding other types of performance issues you have with your house can help us determine the best whole-house solution to your current problem. Can I review a list of common performance problems with you? Which of these common performance problems do you notice in your home? Noisy air <input type="checkbox"/> Soot deposits <input type="checkbox"/> High humidity <input type="checkbox"/> Rotting roof <input type="checkbox"/> Cold air drafts <input type="checkbox"/> Respiratory disorders allergies and asthma Smoky fireplace/ Frequent dust <input type="checkbox"/> Lingered odors <input type="checkbox"/> High energy bills in summer <input type="checkbox"/> Mold and mildew <input type="checkbox"/> High energy bills in winter <input type="checkbox"/> Peeling paint <input type="checkbox"/> Hot and cold rooms (bad distribution) <input type="checkbox"/> Stuffy air <input type="checkbox"/> Intermittent CO alarms <input type="checkbox"/> Foggy windows <input type="checkbox"/> Others: _____	
Which season are your energy bills highest?	Summer <input type="checkbox"/> or Winter <input type="checkbox"/>
Is your house all electric or do you have gas (or other fuels) also?	How do you use gas (or other fuels)?
Assigned to?:	

Prospect Evaluation Score—for internal use only. Circle appropriate score then enter total at right. A prospect is considered “cold” if scored less than 6; “warm” if scored between 6-9; and “hot” if score is 10 or more.

Rate: Need	None...1	Soon...2	Emergency or ASAP...3	Score: _____
Rate: Ability	Vague...1	Good...2	Will finance...3	Score: _____
Rate: Trust	Yellow pages®...1	Job sign/referral...2	Repeat...3	Score: _____
Rate: Effort	Yellow pages®...1	Job/truck signs...2	Visited website or jobsite...3	Score: _____
Rate: Buying Cycle	Impulse...1	Weeks...2	Emergency or months...3	Score: _____
				Total Score: _____

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