

STEP 3—Set and Keep the First Appointment the Right Way

There's more to meeting your prospect than just showing up on time. Get ready to present the best case for your company and expertise, and pay attention to details.

Now that you've been using the *Prospect Capture Form* and have gathered important information about a prospect, you can prepare for your first appointment. That preparation is part mindset, part knowledge, and part attention to details.

You may think setting up and keeping an appointment with a prospective customer is simple, but STEP 3 is where trust can easily be broken at the start.

When you have the information about a potential customer lead recorded on your *Prospect Capture Form*, or you personally fielded the phone call and spoke with the prospect, you likely have a good hunch about the lead's value. To be sure about your hunch, it also makes sense to speak with all decision-makers who may be involved in the sale.

By setting the initial meeting, you are committing yourself to enter the competition for the work with the intention of finishing as the winner. When the doorbell rings, the starting pistol has been fired, and you must be mentally prepared. You want to present your knowledge and expertise, and at the same time, continue to listen to your prospects for any clues that can steer your presentation to help close the sale.

What must happen to make prospects buy?

Closing a sale involves a *transfer of feelings and beliefs*. The greatest sales tool is a **shared belief** in the value and price of your product. Your

mindset is just as important as your prospect's.

Chances are that you have, at one time or another, spent more for a product or service than you budgeted for, simply because you felt right about it. Getting the prospect to feel right is a valuable sales strategy. Being properly informed and confident in what you're selling will help them feel it.

Feelings and beliefs are a combined mental and emotional scorecard, tallied in the subconscious. This mental process measures what the senses perceive as:

- ▶ Enthusiasm
- ▶ Professionalism
- ▶ Value (belief in the price)
- ▶ Confidence (knowledge and experience)

If you don't display these feelings and beliefs, the prospect may decide that you are insincere, or worse, don't have the skills and knowledge they need for the job.

Enthusiasm is a product of each individual's passion and is as contagious as the German measles. It grows in direct proportion to the amount each person shares it with others.

Professionalism is transferred by actions as subtle as how you answer the phone or provide an appointment reminder. It's also reinforced by things like the way you dress, the vehicle you drive (and its cleanliness), your punctuality, and your manners. For example, you could offer to take your shoes off (or slip on a pair of cloth

booties over your shoes) before you step inside your prospect's home. This not only protects their floors, but also shows respect for their home. Combine these actions with the thoroughness of the information you share to make a great impression.

Value is a belief that the price is worth the benefits the service/solution provides. Even with proven experience, some contractors feel like first calculations of cost are sometimes based on a series of guesses. This can lead many to quickly lower prices because they don't have enough faith in their quote. One solution is the use of a unit cost system of estimating, such as determining costs based on square foot, linear foot, cubic foot, etc. When you use this type of system, costs begin to more closely relate to actual costs. You've then substantiated your price, and that belief is naturally transferred to the prospect.

Confidence is developed by combining knowledge with experience. Newly hired individuals often feel a lack of confidence, regardless of their knowledge. They just haven't been through the process often enough to skillfully anticipate what might occur. Greater confidence naturally occurs over time with experience. However, businesses can help speed up this process by offering training, such as the ability for new hires to shadow experienced contractors on actual appointments.

Think about the way you own these feelings and beliefs, and how you can enhance the way you transfer

and demonstrate them to prospects. The *Successful First Meeting Checklist* tool that accompanies this article can help you transfer professionalism and confidence after the appointment is set by delivering a professional confirmation of your scheduled time together.

The *Successful First Meeting Checklist* will help you plan for and have a successful first meeting.

Tool #3: “Successful First Meeting” Checklist

Being ready for a meeting means having the right materials with you and having the right mindset. Once you’ve checked off these items, you’ll know you have everything you need to set your business apart.

Before the meeting

- Google the prospect before the appointment. It’s good to know as much as you can about them.
- Have the appropriate forms on hand to complete the sale on the first visit.
- Use pictures, brochures, tools, testing equipment, and exhibits to engage the prospect’s senses. iPads and smart phones are great for this.
- Continuously visualize the prospect signing an agreement. What you see in your head is more likely to happen.
- Let your prospect know how much time to allow for the visit.

If the meeting doesn’t happen

- Contact your prospect immediately to arrange a new time.

At the meeting

- Display *professionalism*:
 - ▶ Formalize a diagnosis of the home using tools you brought.
 - ▶ Protect the home with booties or take off your shoes.
- Communicate *value*:
 - ▶ Establish pricing using a clear and consistent unit/cost system.
 - ▶ Use price anchors such as sharing the total cost and then pricing each phase.
 - ▶ Believe in the price yourself because you know your own experience.
- Build *confidence*:
 - ▶ Share your own experiences so prospects know they’re in good hands.
 - ▶ Listen for hints of prospects’ fears and concerns and address them quickly.

For more sales and marketing insights, look for the Selling Efficiency Series on your NY Home Performance Portal.

Mike Gorman is the leading expert in teaching contractors how to best position and price their business to increase sales. He’s an award-winning contractor, author, and consultant.