

STEP 4—Ask the Right Questions to Make the Sale

Learn how to present yourself and your business when you enter your prospect's home to make a great impression—and up your chances of making a sale.

The greatest sales tool is a shared belief in the value and price of your project, so the first meeting you have with your prospect has to reinforce this belief on the part of your prospect. Read how to make the right impression in person, and ask questions that deliver crucial information to your sale.

You find yourself at the front door of your prospect's home. You've already checked your appearance and are prepared for this meeting. So smile, shake your prospect's hand, present your business card, and start with a solid greeting: "Good morning, Mr. Prospect. I'm Joe A. Wizard from Home Performance Experts. We spoke by phone last Tuesday about the project you and your wife are considering. I'm glad to meet you!"

Then steer the prospect to their comfort zone. The kitchen is usually the friendliest place in the house. When friends and neighbors come over, they are entertained in the kitchen. You can put them at ease by saying, "Let's start in the kitchen. We can use the table and it will be more comfortable." You should accept any hospitality offered by the prospect—whether it is coffee, soda, dessert, etc.—most anything except for alcohol. This makes the prospect feel like a good host or hostess.

There are some who say that the one-call close is not possible. Others simply say that the impossible

just takes a little more time at the customer's kitchen table. Just remember to listen carefully, and take notes as appropriate during your meeting. Your notes will be useful when you put together your proposal and price.

Also remember this: the contractor who does the best job educating the prospect and earning the most trust always wins, and they win at their price and on their terms. If you leave the first house call without an order, you may decrease your chances of making a sale by 80%, which means you'll have to work much harder to make the sale later on. The minute you leave the first house call without an order you lose momentum and you've wasted precious time.

Choose a seat at the kitchen table that is beside the outside wall. This prevents the prospect from wandering through the kitchen as you are working and watching over your shoulder. You will want to spend some time talking about things other than business for the prospects to get comfortable talking with you.

Feelings and beliefs can't be efficiently transferred by fax, phone, or email. So many contractors visit the job, look things over, go back to their offices to calculate a price, and sooner or later (usually later) send the proposal by mail, email, or fax to the prospect—only to find that they can't seem to make any money. Don't rush

this in person process. Listen, and let your prospects help you determine what they need.

Once trust has been established, prospects look to the contractor as a partner who will guide them. How do you know that you have their trust? You'll know when your prospect will answer any question you ask.

Then say, "Before we go for a tour of the house, can I ask you a few questions so that I can be sure I understand the conditions you're experiencing?"

Review the information from the *Prospect Capture Form* that you used during the telephone conversation. Then ask for permission to ask a few more questions to get "the complete picture." Now, refer to Part 2 of the *Prospect Capture Form* and go through the questions there. You'll be asking prospects to describe the signs and symptoms inside their house that will help you diagnose their needs.

See Part 2 of the *Prospect Capture Form* on the next page.

Tool 4: The Prospect Capture Form — Part 2



The second side of the *Prospect Capture Form* explores issues the prospect is experiencing so you can help improve their home’s energy performance and their quality of life. Download easy to complete copies of the *Prospect Capture Form* on the NYSERDA Home Performance Portal dashboard.

Mr. Mrs. Ms. Name: _____

You mentioned that you were interested in new: Windows Insulation HVAC equipment Other: _____

What exactly did you have in mind? _____

What do you hope to accomplish with these renovations? _____

What new products have caught your eye? _____

Where have you seen that product before? _____

What do you like best about that product? _____

What research have you done? _____

What have your neighbors done about this? _____

Do you ever find yourselves battling over thermostat settings? _____

In the () years you’ve owned your home, what rooms have been the least comfortable from a heating / cooling perspective? _____

Why is that? _____

Which rooms in the home are most comfortable?	Why is that?
What’s generally happening to make you run out of hot water?	How much of a problem is this?

What if we (replaced/upgraded) your (windows/insulation/ HVAC equipment) and you still experienced these conditions? How would you feel? _____

What if we could solve your problems of () without changing your (windows, insulation/ HVAC equipment), would that suit your needs? _____

We look at:

Effectiveness of insulation	Carbon monoxide levels in the home	Windows
Proper function and venting of gas/oil appliances	Attic and crawl space ventilation	Evidence of rot
Indoor air pollution sources	Weather in the attic	Is your house all electric or do you have gas also?
How you use gas		

You may have noticed some of the symptoms of a home that needs updates:

Noisy ducts	Condition of roof from the attic	Abnormal energy bills
Ice dams, icicles on the house roof	Air leaks in the envelope of the home	Foggy windows
Mold, moisture, and odor	Condensation on interior surfaces	Headaches, asthma, allergies, or respiratory disorders

“Because our testing can reveal problems not commonly observed, usually we can save you money in the long run.” We don’t want you to be disappointed by over spending on unnecessary work that doesn’t solve the issues you mentioned. After all, what could be more uncomfortable than having to pay for new _____ while living in a home that is still experiencing problems. I need the help of yourself and your (spouse/partner/_____) initially to show me through the home and share any conditions you might have observed, and later to give us your input about the best of various options for improving the home.

May I have your permission to contact your utility provider(s) if needed in order to get a history of your usage for the past year? I have an authorization form here for signature. Yes No

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.