

**Interviewed by:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Time**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Greeting**: Thanks for calling \_\_\_\_\_\_ (where landscapes are always in season). This is \_\_\_\_\_\_\_\_\_\_\_\_. How may I help you today?

**What led you to call us today? (ID Marketing)** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Have you hired us before?** Yes or NO (circle) Type of project: (circle)

Landscape Hardscape Maintenance

Snow Seasonal Clean Up Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Tell me about your project:**

**Tell me more:**

**Prospect Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Spouse**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Project Manager \* Owner \* Architect \* Facility Engineer \* Other:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Complete Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Home phone**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Work phone**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mobile phone**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Fax**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Email address**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Do you have a landscape plan and/or written project specifications?**

Y or N

**If yes, how many copies do you have?** \_\_\_\_\_\_\_\_\_\_\_\_ **Who drew the plans for you?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ If no, that’s OK. We provide project design and written project specifications services.

**Do you have a date in which this project must be completed?** Y or N

Date & details:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Have you established a budget for this project?** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **OR**

Approximately how much do you plan on investing in this project? (Circle)

$100,000+ $50,000 to $100,000

$25,000 to $50,000 $5,000 to $25,000

**Initial Consultation Schedule** (always offer two time slots such as Tuesday at 8AM or Wednesday at 1 PM) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Directions or special notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Consultation Fee**: $50 - Pre-paid **OR** collect on visit

**Overcome Objections** – (see instructions below)

1) Feel, felt, found 2) Risk reversal

3) Compare and contrast 4) Our site no charge

5) Email package \_\_\_\_\_\_ 6) Direct mail \_\_\_\_\_\_\_\_\_

Instructions and phone skills workshop:

1. This form will be your guide to a successful phone interview. Each line should be filled out completely following the guidebook and in the order outlined.
2. “Interviewed by” is the name of person filling out the form and date and time of call.
3. Phone greeting should be standardized greeting for your company and every person who answers the call should follow this procedure.
4. The first words out of the prospects mouth point you in a certain direction. Write it down in their exact words.
5. “What led you to call us today?” is used to determine the marketing activity that generated the lead. You may also use “How did you find our phone number today?” or “Where did you find our phone number today?” for clarification. You really need to be detailed to learn what marketing is working. For example: By clearly identifying referrals, you will be prepared to reward people who refer your company.
6. “Have you hired us before?” Small firms may find this unnecessary. But even small firms grow and add people. New employees, seasonal employees or phone answering services will be best served by asking this question every call. You will have a good reason to waive the initial consultation fee is this is a repeat client.
7. It’s a good idea to select a category of work as described by the prospect. You may customize, add or subtract from this list.
8. The most powerful part of this exercise is to recognize that the more details you learn about the prospect’s needs in advance, the better prepared you will be to customize your proposal to meet their needs. This means…get a signed contract. Do not be in a hurry. Be patient. Acknowledge their description of needs and problems with the occasional “yes we do things like that” or ‘Yes, we’ve seen those problems before”. Listen for key words, “I want, I need or I would like to have”. Write down in the prospects EXACT WORDS what they ask for.
9. Always ask for more details. Encourage them to talk more. The more they talk, the more you learn. It’s ok for a call to last 10 to 20 minutes or more. Never put them on hold or take another call during the interview unless you have a major emergency.
10. Take control of the conversation. Eventually they will run out of breath telling you about what they need. At this precise moment you simply say, “Ok Mrs. \_\_\_\_\_, I think there might be a fit between what you want to have done and what we do here at \_\_\_\_\_\_\_\_. There are just a few questions I have in order to help you get the information you need, OK.
11. First, please help me make sure I have your name spelled correctly and repeat the spelling back to them. Your address and help me spell that correctly and repeat it back to them. The action of repeating back the phone numbers, email etc demonstrate your company’s attention to detail and willingness to get the job done correctly. ***NEVER SKIP THIS STEP.***
12. We move into qualifying the prospect over the next 5 steps. Your job starting right now is to make sure this is good, well qualified prospect. Do not be timid. Follow the steps and you will find yourself with higher close ratios and higher profit jobs. Remember, your job here is to help your prospect solve a problem!
13. Asking about plans and written specifications is a set-up question. By asking this question in advance, you get the chance to create a perception of value for your plans and specification services. You will use this information to your advantage. If a prospect has plans and specifications, you need to know this and handle the prospect a little bit differently than someone who does not. If a person has multiple copies of prints, they are planning on getting several bids. This is OK…and it’s good you know it in advance.
14. Timelines are critically important in qualifying the prospect. There is no need to waste your time with a meeting if the prospect has an unreasonable time line or your company is booked way beyond their completion date needs.
15. Getting the budget is actually a fun game to play. The more times you practice this game, the easier it becomes. Getting a budget from every single prospect is simply being prepared to discuss money on the very first phone call. Recognize that all buyers are liars (not in a dishonest way, just a deceptive way in most cases). In order to get a budget, you must be prepared to suggest a budget. Seldom will you get a budget with the initial question. “Have you established a budget for this project?” The answer is usually, “We’re not sure what it will cost, that’s why we are calling you!” You simply respond: “Here at \_\_\_\_\_\_landscape we do projects of all sizes, from very large and to pretty small. Do you think you will be investing more than $100,000 on this project?” You usually get a reaction out of a question like this. It’s OK if they seem excited and say something like “$100,000 are you crazy? I’d never spend money like that.” Don’t let the statement or reaction bother you. Just say this, “Well Mrs. \_\_\_\_\_\_\_, that’s why I have to ask about the budget. We do projects of all sizes. I just need an idea about the budget in order to: (assign the best qualified designer, assign adequate meeting times, select the best schedule, provide the correct supporting materials, etc.) You simply give a reason best suited for your company. You then get ready for the next question and roll right into it, “Do you think you guys will be investing $50,000 to $100,000 on this project?” Again, the reaction can be pretty strong at times. But sometimes, they will simply say, “It could be that big. We’ve been planning this for years.” My experience says that if you are prepared to ask the budget question 3 to 4 times, you will always get a budget of some kind. This is key. On the third or fourth question, you simply introduce a minimum size project range like this,: “Mrs. \_\_\_\_\_\_, do you think you guys might have a budget between $5000 and $25000 for this project?” Your company may have a minimum project size of $500 and your largest project of your career may be $5000. The size of the budget numbers suggested are not as important as the relationship of those numbers to your company’s capabilities. Ask for a budget three to four times and you will get it every single time. Skipping this part of the interview during the initial call sets your sales people up for failure, wasting time and low close ratios. ***Never skip this!***
16. Use these power words, “When we come out for an INITIAL CONSULTATION, we can help you more closely determine the budget that will accomplish your goals.” This is a set-up statement. ***Never skip this.***
17. We have an available time to meet with you at your home (property) on Tuesday at 8 am or Wednesday at 1 pm. Always be prepared to schedule meetings on the initial phone call. ***Remember, money finds speed. Speed finds money***. Failure to schedule the next appointment is failure to succeed in sales. NEVER say “When would you like for us to come out?” If you do this, you NEVER have control of your schedule. Set sales person’s schedules like this, 4 hours out in the field, four hours in the office to work on what they just looked at and to turn the proposal around quickly.
18. Note: Providing hand written proposals in the field for projects under $5000 is a sure-fire way to increase close ratios and turn prospects into customers. Larger projects usually require more time for design and creation of specifications, but even these projects should get a written estimate in the field. The idea is to sell a plan and development of specifications for $100 to $2000. Ask for the order. Offer to apply plan fees towards the installation of the project.
19. Sell the INITIAL CONSULATION. Begin by repeating back what you have covered during the call. Read the notes about the project. Repeat the address. Repeat the meeting time. Then say this: “OK Mrs. \_\_\_\_looks like we are all set. Oh, by the way, when we come out for our initial consultation, there is a small, nominal fee. It’s only $50 and for this you will get a written proposal to help you with your decision for this home improvement project. Would you like to pay with a credit card today or simply pay the designer with a check at the time of the visit?” Get ready to sell the initial consultation. Many times there will be objections. That’s OK. You may hear something like this, “$50 are you crazy? $50 just to come out here? I’ve already called 5 other companies who will come out for FREE.” Just ignore the reaction. Your job is to sell $50…almost nothing.
20. **Feel - Felt - Found** – I understand how you feel about the $50 fee. Others have felt just like you do about it. However, after careful consideration, they found the $50 investment was well worth it. Our team has amazing ideas and extensive experience in solving a wide range of landscape issues. Would you like to keep the appointment?
21. **Risk Reversal** – The initial consultation fee will be applied to your very first invoice if you hire us to any future work. Does that sound fair?
22. **Compare and Contrast Story** – We had a situation not too long ago where a prospective client was really unsure about the $50 investment for the Initial Consultation. However, after meeting with our estimator/designer, they came up with several ideas that saved several thousand dollars during the construction of the project. In that case, our client felt the $50 investment was well worth it.
23. **No fee to visit us on our property** – You are welcome to come to our facility to review our portfolio of services, meet our staff, look at materials and discuss your project goals. We have time available on Tuesday at 9 am and Wednesday at 1 pm. Which do you prefer?
24. Free quotes if you have scaled drawing AND written project specifications – If you have a scaled drawing, product/materials list and written specifications, we are happy to provide a project bid at no cost. Our only requirement is that you promise to share the bid results with us within 48 hours of bid opening. Does that sound fair?
25. Get credit card info or commitment for payment by check – Always offer the option to pay by check on site or pay by credit card over the phone. (Yes, if you take credit cards in the field, that’s cool too.)

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