



# The Survival Guide for Sales Leaders

**in Home Improvement**





# Have a **Plan**

Home improvement and remodeling sales aren't for the faint of heart. From customer nurturing to finance and closing deals at the kitchen table, it's all too easy to lose the deal through a small mistake.

You can help your sales team hit their targets, deliver a winning homeowner experience and increase profits for your company by planning for disaster before it strikes! Start strategizing beforehand to eliminate missteps in target attainment, team management and homeowner experience with ease.

With this short survival guide, handle any disaster in sales leadership with ease. You'll find common scenarios, what to do in the event that calamity strikes, and steps to take to prevent it all from happening in the first place.

**Now that's professional.**



Section I

# Target Attainment

Contract Chaos | Payment Processing Predicament | Sales Call Calamity | Material Mayhem



# 1

## Contract Chaos

You've created your estimate, nailed your presentation to the homeowner, and got a signed contract in hand in record time. When you return to the office, you realize with a rush of dread that you didn't transfer information from the estimate over correctly, and the contract your happy owner signed is priced for 21 windows instead of 24.

### Plan

#### Redo the Calculations

Carefully rerun the numbers to figure out how big the gap is between additional materials needed and their associated cost. This will help you determine the best course of action.

#### Make a Decision

This could be your sales goal on the line, so you need to make a call on how you're going to handle this. Determine if, for example, the company is going to eat the cost, requote the customer or find a middle ground with a discount.

#### Contact the Customer

Once you have a plan of action, reach out to the customer and let them know about the oversight. Be transparent and apologetic and lead with solutions you have to maintain goodwill with the customer.

#### Call Script

"Hello, [Customer Name]. I wanted to reach out to you about your recent quote. We've realized there was an oversight in our initial material estimation. Our goal is to provide the best quality work, and to do so, we need to discuss the updated cost of the project."

### Prevent

#### Implement a Task List

Create and circulate a task list within your sales team to serve as a final check on details of a contract before presenting it to homeowners and obtaining signatures.

#### Use SalesPro's Estimate to Contract Linking

Estimate to Contract linking ensures that everything discussed in the estimate is populated in the contract without having to rewrite, re-enter or try to remember important details.

## 2

# Payment Processing Predicament

Your home visit has gone incredibly well. Everything is ready to go, you have a signature, and the homeowner is ready to slap down a deposit then and there. Happily, they pull out their credit card, and now you're in an awkward situation. You don't have any way to process the payment!

### Plan

#### Ask for Other Payment Methods

Hey, it's worth a shot! See if your customer might be able to write a check instead, and if not, let them know you can always come back and pick up the check later.

#### Call the Office

Offer the customer an opportunity to have their payment processed over the phone by office staff with the proper equipment.

#### Word of Caution

Avoid writing down credit card details and removing them from the home. This signals that you're serious about the customers' well-being and are not willing to compromise their security while you pursue payment.

### Prevent

#### Use a Payment Processing Tool

Invest in a sales enablement tool or point-of-sale app to make payment processing a breeze. Tools like SalesPro are able to collect ACH, e-check and credit card payments in just a few clicks. Plus, SalesPro has complete data security, so your customers' financial information is always protected.



3

## Sales Call Calamity

You're on your way to your next sales appointment with a homeowner who's in need of a new roof. Ready with your pitchbook binder, paper estimates, pens and shingle samples – it took all you had to gather everything you need to make this a rainy day, one-call close. As you make your way to the front door, you trip, and everything falls into a puddle. With everything ruined, the call is over before it even begins.

### Plan

#### Life Happens

Time to make a judgment call. Do you feel confident to wing it, or do you think the customer will be open to reschedule? You can also pass this call off to a more prepared sales team member, even if it costs you your commission.

### Prevent

#### Back, Back, Back it Up

Always have digital copies and back-ups of your most-used workbooks, brochures, and assets that are easily accessible. If you're married to the hard-copy life, no sweat. Keep a physical copy around, so you're not caught on the back foot. However, when you go digital, you never need to worry about where you put that hard copy.

# 4

## Material Mayhem

You've sat at the kitchen table with a homeowner, looking over options for their dream bathroom in a supplier catalog. They have their heart set on a mid-century chartreuse ceramic for a backsplash, and you hurriedly enter the SKU and close the deal. However, when you get back to the office, your production manager comes back and tells you the tile is no longer made. The homeowner will be heartbroken!

### Plan

#### Pull Your Options

Before you inform the homeowner, prepare a list of comparable tile selections in the same price range, style and color. Prepare everything you need beforehand.

#### Call the Homeowner

Call the homeowner as soon as possible and let them know their preferred tile is no longer in stock. Be apologetic and understanding and let them know you've conducted research on similar styles so they can still have the bathroom they envisioned.

### Prevent

#### Create Guardrails

When you rely only on printed materials, you can run into an unexpected shortage in stock or worse, a discontinuation. Bring an electronic way to check stock before you settle on the contract, if the supplier offers a digital version. Tools like SalesPro have a built-in price guide with materials availability so that you're never caught selling something out of stock.

#### Testimonial

"I think the biggest focus for us was the accuracy of the contracts and we were excited by the ease of implementing new products. If a color wasn't available anymore, we could take it off the contract. If the price went up we could update it in the backend." - Adam Champagne, HomeFix



Section II

# Team Management

Flight Risk Faux-Pas | Dropped Call Disturbance | Empowerment Error | Margin Mayhem





# MISSING

1

## Flight Risk **Faux-Pas**

Your new sales hire shows up on day one ready to go, and eager to start making homeowner visits. However, you have two full weeks of training for them to get up to speed on all your product SKUs, point-of-sale systems, pitchbooks, estimate templates and so much more. By day 3, you can tell he's checked out. By day 10, he's out the door. Now it's back to the hiring pool.

### Plan

#### Set Expectations

During the hiring process, set expectations for training plans and length, and why it's important to spend that time up front.

#### Testimonial

"We had an expectation that our design consultants were going to mess up. I needed to be okay with the fact that yes, I've trained you, I know you're going to forget things, and I know you're going to miss things. The advantage of having Leap is significant, in that I've put locks into the system. So when a sales rep or design consultant picks X unit, it asks a series of questions which allow for Y Unit to be needed to move forward to the contract phase. I just removed two months of praying and hoping that someone didn't make a mistake." -Jonathan Moore, NorCal

### Prevent

#### Make Your System New-Hire Friendly

Invest in an integrated system for your team that's easy to learn before going on sales calls. Tools like SalesPro have everything your new hires need built in, and important company guardrails to protect your margins and make sure every commonly looked-over detail is included.

## 2

# Dropped Call Catastrophe

You're finally out celebrating your 10-year anniversary with your spouse. You're enjoying drinks and appetizers, when you get a frantic call from one member of your sales team. He's working to close a big roofing contract, and you have to talk him through what discounts he can offer without cutting into profit margins. Meanwhile, your spouse is sitting there eating all the appetizers. Alone. Again.

### Plan

#### Disconnect as Soon as is Appropriate

Provide the information your sales team member needs, and then let him know you won't be available for the rest of the evening and plan accordingly. Ask him to use his best judgment and give some verbal guardrails for him to keep in mind.

#### Name a Second in Command

You won't be able to avoid every dropped call, but name someone experienced on your team to be a resource when you absolutely can't be available. This will save your work-life balance and sanity!

### Prevent

#### Set Guardrails in Your Systems

Implement a sales tool or guide that lists available discounts and minimum floor pricing. Or, use tools like SalesPro, where these features are built into every estimate. With these guardrails, your team can close deals, protect the profit margin and not your constant help.



# 3

## Empowerment Error

Your latest hire seems to be doing well, except they seem to be lacking confidence. You've gone on several ride-a-longs now, and it's gone from awkward to unbearable. If you can't get your new sales team member to stand on their own, you're going to have to let them go.

### Plan

#### Talk it Out

Have an honest conversation with your team member and find out why they're hesitating. It may be a problem that's easy to fix. If it's not, prepare for the eventuality that you might need to replace this hire.

### Step Back

Every time comes for a sales rep to sink or swim. Let your team member know you'll be a resource by phone if they have a question but release them to complete a visit on their own. Experience is the best teacher!

### Prevent

#### Automate the Hard Parts

Invest in a sales enablement tool like Sales Pro that has guidelines and guardrails for team members of every level experience to create winning estimates. You can also create packages so your sales team can easily build different packages for different price levels, so kitchen table conversations don't stall.



# 4

## Margin Mayhem

Your new sales rep comes in, so excited that they made their first sale. They convinced the homeowner to purchase a brand-new roof, instead of the original partial replacement talked about. But when you review the contract, you can see why the homeowner was so easily swayed in the upgrade. Your sales rep input the run of the roof, instead of the span. The measurements were input for half of the roof size.

### Plan

#### Be Prepared to Lose

We're not going to sugarcoat it; this is a big error. Be prepared to lose this customer, even if there are discounts you can offer. Your focus should be relationship management, so that this customer, if they don't move forward, doesn't bash you in public outlets.

#### Run the Numbers

Find out from your sales rep what the customer was originally interested in. See if you can perform the original job requested with a decent discount to try to save the relationship.

#### Call the Customer

You may have to eat major crow here but be truthful and transparent. Let the customer know that there was a major error in measurements, and your new sales hire didn't capture it. Ask if the customer would still be interested in the partial roof replacement at a lower price point and ask if they want numbers run to see what that new roof would cost. Be apologetic and helpful.

### Prevent

#### Invest in a Measurement Tool

You can reduce errors in measurement and quoting with measurement tools and formulas. That way, measurements will always be accurate for your estimates. SalesPro has built-in measurement tools that factor in waste and takeoff, too! Plus, SalesPro integrates with measurement tools like EagleView, Hover, Scope Technologies and GAF Quick Measure to make your already-existing tools work for you better than ever.



## Section III

# Homeowner Experience

Contact Confusion | Overstaying Your Welcome | Finance Flaws | Approval Anxiety



# 1

## Contact Confusion

Greg, your top salesperson, just came into the office fuming. He showed up at a prospects house only to find out Jill had already resulted. It turns out your web-based browser tool struck again, and the resulting wasn't updated in the system. Since it wasn't recorded, a sales rep was booked twice.

### Plan

#### Investigate the Source

Calm Greg down and investigate the cause of the miscommunication. Review the process for appointments and lead statuses and find out where it broke down. Review appointments and lead statuses during weekly standups to ensure awkward moments don't happen again.

#### Apologize to the Homeowner

Have Jill reach out to the homeowner and apologize for the double visit. Explain it was a clerical error and she has everything well in hand for a contract for their project.

### Prevent

#### Make Sure You Have a Lead Nurture Tool

Breakdowns of your pipeline can be costly in time and money. Invest in a CRM that connects with your sales teams in-home sales tools so you always have an updated view of lead statuses and assignments.

### Testimonial

Prior to transitioning to Leap, I would have to go back and check every single appointment, make sure there was a sketchpad uploaded, a contract uploaded, notes uploaded. Some of my guys were resulting calls and they weren't actually getting uploaded to our CRM as being resulted. That created a lot of confusion and made it hard for our rehash department because they didn't really know what was going on, notes were missing and all of that was eliminated when we transitioned to Leap." - Samuel Summers, Winstar



## 2

# Overstaying Your Welcome

After taking measurements, making calculations, figuring discounts and spending more than two hours in the home, you're finally ready to go. You prepare to sit down with the homeowner to share your estimate, but you can tell they're already annoyed – which makes it harder to close the deal.

### Plan

#### Reassure the Homeowner

Thank them for their patience and explain you've taken your time to make sure the details are correct, so you only must be in their home once.

#### Assess the Process

Figure out if there are any parts of the sales process you can do off-site, if the homeowner seems particularly put out. Maybe you can follow up via email or telephone so you can get out of the home sooner rather than later.

#### Be Concise

Stick to the important details in your presentation and save the sidebars. Thank them again for their time and patience as you wrap up.

### Prevent

#### Save Time with a Tool

Use a tool that manages all parts of the estimate-creation process with ease, like SalesPro. Measurement tools, pricing guides and speedy estimate proposals are at your fingertips to shave hours off of your visits. You have everything you need to create a winning estimate in minutes.

#### Testimonial

"Using Leap helped us compress time in sales and production, making our whole customer experience better. It is a paperless system for contractors that makes everything more accessible. As a management system, it helps you better define and control the sales process." – Patrick Neuman, Advanced Window Systems



# 3

## Finance Flaws

The homeowner picked out their perfect granite countertop and fixtures for their new kitchen. You're putting everything into an estimate, and while the big number is scary, you reassure them that they can likely afford the monthly payments based on your napkin math. The deal goes through, and as your company is starting to plan the installation you get an angry call from the homeowner. The first bill came in, and it's over \$200 more than you quoted.

### Plan

#### Hit Pause

You'll likely have to put the project on pause while the homeowner renegotiates with the loan provider. Look for ways to cut costs for the homeowner to salvage the relationship.

### Prevent

#### Manage Package Pricing

Skip the napkin math and get realistic payment estimates based on different packages and loan types, so the customer can choose what best fits in their budget. SalesPro offers good-better-best packages and loan calculators with interest and plan levels, so you can give accurate financing information at the kitchen table.





# 4

## Approval Anxiety

You just learned that offering financing increases close rates by 18% and job size by 30%! So, your company just signed up with a lender to offer homeowner financing. However, on your first call out with your new lender, the homeowner was declined. Now you're stuck in an awkward situation with a homeowner that can't fix their roof.

### Plan

#### Look for Other Methods

Help the homeowner investigate financing options through credit unions, their bank or other resources. Keep in constant contact and be as helpful as possible to limit the possibility that they might find another contractor to work with during their search.

### Prevent

#### Have Multiple Financing Options

Look into offering waterfall financing so you can use one application and submit to multiple lenders, to find the best fit for the homeowner at the kitchen table. That way, you're not limited to simply one lender to offer.



# Make Selling Simple

SalesPro is the leading in-home sales app that automates every step in your sales process and helps your business realize the power of a high-performing sales team.

## Simplify Your Selling

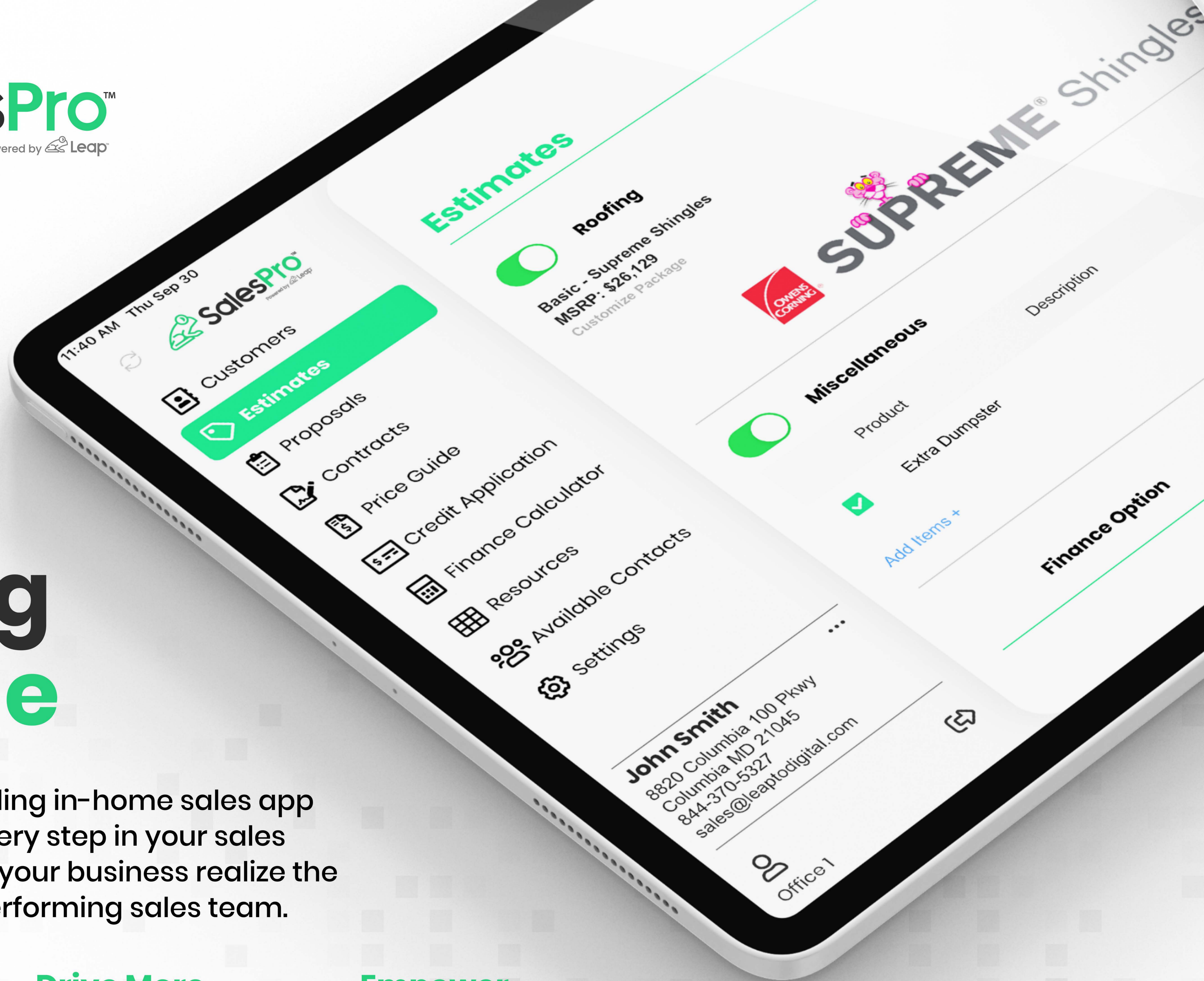
Impress prospects by quickly working up estimates in the home and present pricing options with ease.

## Drive More Revenue

Control pricing and discounts to achieve higher profit margins so you can earn more with every product and on every deal.

## Empower Your Team

Train new sales reps faster and attract the best talent around. SalesPro is the tool your sales team needs to succeed.



# Features & Plans Built to Help You **Close Deals**

## Estimates & Bidding

It's easy to create accurate, digital project estimates when you have all the product and pricing information you need.

## Proposals & Contracts

Provide easy to digest proposals to help customers immediately see the value. Close the deal with a digitally signed contract.

## Financing & Billing

We partner with top lending providers to offer your customers convenient financing options and fast on-site approvals.



**Free Remote Signatures**



**Free Payment Capture**



**Master Discount Controls**



**Measurement Integrations**



**In-App Financing**



**Team Calendar**

**Schedule a Demo at:**  
[Leaptodigital.com/salespro](https://leaptodigital.com/salespro)

