
Chapter 1

Sales

Selling Your Services

People do not normally seek out contractors to do work for them. They often talk and think about projects they would like done, but it usually takes a sales person to get the person to act.

Selling construction services requires that you find out what the customer wants. You will not normally have a ready made product to sell. Instead, the project you sell usually has to be:

- Designed
- Detailed for specifications
- Researched for code compliance
- Made to do what the customer wants

Too often the selling process does not include project details of concern to the owner. In the haste to get a project sold and up and going, the owner and the contractor overlook many details of the project by not dealing with them in the selling process.

Listen to your customer and seek to understand their unspoken fears. Most people fear a decision because of making a mistake. Help them settle these fears.

The simple facts are: 1. When two contractors of equal reputation and skill are seeking the same customer, the better sales person will usually win the contract. 2. Without adequate sales activity your contracting business is likely to flounder or even fail.

People want to buy things that they like and understand. Even though they have a project that they want done, most people are unsure about buying until they are shown, in detail, that spending their money will get them the situation they are dreaming of.

Four Reasons to Buy

People are moved to buy something for one or more of four reasons. The sales process will usually focus on one of these reasons to be successful. You can ask questions of your prospect to find out which one is their main reason to buy.

1. Increase Comfort and Usefulness

Your prospect may be tired of something that is just not working for them and may want to change it. It could be a new set of stairs with a firm handrail and a landing to make the climb easier. It could be a new set of kitchen cabinets with brand new drawers, pullouts, and swing-out options. It could be a whole new house, with the room for a growing family.

In any of these cases you can work on the same goal as your prospect. You can help them gain the comfort and usefulness they desire.

2. Improve Image

Many people will buy to improve their image, especially in their own view. Someone might want their property landscaped to improve its appeal in the neighborhood. Another person might desire a deck with a hot tub and lighting for entertainment. Almost everyone wants the newest and latest trend and will often want to be first with a new gadget.

These prospects will normally describe how the desired change will improve their image. You want to be able to comment on how the proposed change would "really make the project look a lot better," and check out the prospect's reaction.

3. Protect an Investment

Repair and remodeling usually have something to do with this reason to buy. You may want to suggest this reason to buy as an addition to the others when you are helping the prospect look at the reasons to buy.

The siding is broken and falling off. The prospect wants a new image, but you can also comment on the investment points of different types of siding. The owner wants to modernize the bathroom to increase usefulness. You point out the benefits of changing fixtures as well as enlarging the shower and installing a skylight. When the house is sold, they will likely recover all costs of the extra items and have a quicker sale.

Be prepared to help the prospect locate the information to confirm your suggestion of higher investment value.

The world's best sales person is probably the one who sold two milking machines to a farmer with one cow, and then took the cow as down payment.

Selling for the long term, when you are building a close business relationship, involves empathy for the customer's position. People want to develop significant long-term relationships. A contractor can do this quite well by taking time to open trust and meaning as a part of the sales process. You have to keep remembering the people part of your contracting business.

4. Reduce Risk, Worry, Trouble, and Expense

Many people get fed up with problems and just want them to go away. They are tired of the old and are looking for something new.

The old windows leak air and are hard to get open. They also look bad because of all the paint jobs of years gone by. New vinyl or wood windows would be just the ticket and are easy to change. They want to buy more tools for their shop, but the lights already dim when a machine is running. It is time for a new service panel and upgraded wiring to the shop area.

Find out the emotional issue involved and help to solve it. Make the prospect feel that the project will create the safe and worry-free situation that they desire.

The contract will always include references to plans and specifications. This group of documents set out the total description of the project. The contract has to match the customer's idea of what the project is.

Selling and the Contract Form

A construction contract describes the details of the project. Instead of a product the customer sees, you get the customer to sign a contract that states what the project (or product) will be.

Because you sell the project through the contract, you have to be sure that the details of the contract state the full nature of the project. A large part of the selling process involves detailing the terms of the contract. When you and the customer agree on the contract, the sales process is done. Therefore, the sale is made when the contract is agreed to, signed, and a deposit is given to you by the customer.

Your goal is to make the customer so satisfied that the sale is inevitable.

Selling Yourself

For most contractors, the trade-work they do or the construction management skills they have will identify them as unique in the construction business. Your identity, or position, in the customer's mind is critical to your success in landing work.

Price can become an issue in selling contracting projects. In many cases your identity with the customer of having superior abilities will win the day over lower prices.



Note

Do not confuse identity with image. What you want is a strong identity, not an image.

Identity is the recognition and establishment of a true situation. You have the identity as a master tile setter. Your work has proved it.

Image is a likeness or similarity to someone or something; thus an image makes you only "as good as" something outside yourself.

No matter about any other information. Get their name correct.

The distinction between identity and image is important for you to keep in mind as you seek your position in the construction marketplace and in the customer's mind.

Building Trust

It should not surprise you that most people do not trust contractors. There are a lot of stories about contractors who did not do what they said they would do. You want to overcome this negative image with a positive identity. You want to make it clear to the prospect that you can be trusted to do what you say you will do. You want them to know that your word is good.

Show your care and concern by learning about your prospect. Find out all you can about their reasons to buy. Include every detail of all that is important to you and your prospect in the proposal/contract. Let them see your full understanding of their project, and how you intend to carry it out.

The Sales Process

The sales process has two major requirements:

1. The person being sold to has to move along a line from being interested to actually signing a contract and writing a check.

2. You control the sales process. You have to move the potential customer along the line to signing the contract and writing a check.

For most contractors, the idea of selling to get work is a fearful one; yet you cannot stay busy without selling. The remedy to this problem is understanding how to move the potential customer along the sales process line. This involves knowing what you have to do to control the sales process.

The Sales Process Line

Please turn to page 23, Exhibit 1, for a graphic look at the sales process line.

You don't have to be a great sales person. A good average effort, done consistently well, does just fine.

Elements of the Sales Process

The elements of a typical contractor's sale will be slightly different for each type of contracting business. These sales elements take into account the main points of the normal sales process of selling contracting services to an owner or another contractor.

The seven sales elements are:

- Find a prospect.
- Qualify the prospect.
- Gather information about the proposed project.
- Present the proposal, bid, or estimate.
- Negotiate the points of the proposal, bid, or estimate.
- Deal with objections the prospect has to points in the proposal, bid, or estimate.
- Close the sale.



Note

Closing the sale means you get a signature on the contract and collect a deposit of some kind.

Personal Sales Example

A good way to understand the sales process and its elements is to recall a sales situation you were in recently. What did you buy that involved a sales person and a sales process?

The sales person likely followed a process and led you along to the close of the sale.

**Note**

The sales experience you recalled may have involved a sales process that you did not like. Attempt to set your negative feelings aside as you remember the sales process. Make a vow to yourself that your own sales process won't leave your customer feeling negative towards you at the end.

Moving Along the Sales Process Line

Use your personal sales example as you go through the elements of the sales process below.

1. Find a Prospect

You have to have someone to sell to. Therefore, you have to find people who are somewhat interested in what you have to sell. This is the main task of your marketing process. Your marketing process must produce names of prospects.

Of course you will want to talk to the people most likely to buy the contracting services you offer. You do not want people who have no interest at all in the work you do.

How did you become a prospect for the sales person in your example? How did you become interested in the item you bought?

Your customer is always thinking, "What's in it for me?"

**Note**

As stated, your marketing process is supposed to generate interested people to talk to. We will discuss marketing in the next chapter.

2. Qualify the Prospect

You have to determine that your prospect for a sale is worth spending continued time with. The person you want as a prospect has to be able to complete a sale with you. This does not mean that your prospect has to start out promising to buy from you; however, you want to know that the prospect has a sincere desire to have a project done that you can do for them.

The Sales Lead Form

An easy way to qualify a prospect is to ask a series of questions right away. The list below is an example of how to determine if a sales lead should be followed or politely refused. Never just abandon a sales lead! If for some reason the project is not for you, let the prospect know.

Sales Lead Form	
Date _____	Source _____
Name _____	
Address _____	
Home Phone _____	Work Phone _____
Best time to call _____	Where _____
Project Type _____	
Comments _____	

Planned Start Date _____	Budget _____

Pre-Qualify the Project

Your prospect will normally have a lot of information about the project they are planning. You have to determine how accurate the information is and if the prospect can follow through with the project. You want to find this information out quickly.

The areas you want to explore in the pre-qualification process are:

Project Type and Scope

- Exactly what does the prospect want to do?
- Can they describe the proposed project in some detail?
- How much help will be needed from you for the prospect to know the full scope of the project?

Be a source of ideas and sources of information

Reason for the Project

- What does the prospect hope to gain with the finished project? What specific results and changes are expected from the project?
- Is this expectation reasonable?
- What will you have to do to help the prospect understand more about the nature of the project?

Resist the common tendency to believe that what is good for you is good for the customer.

Schedule of Construction

- Does the prospect realize the time necessary to construct the project?
- Is the prospect ready for the disruption to normal routines that will be caused by the project?
- Can the project be done in the time space available as set by the prospect?

Budget

- Has the prospect correctly estimated the cost of the project?
- Is the prospect aware that most construction projects go over budget?
- Does the prospect have the money or a good source of financing available for the project?
- Is the money available now?

Communication is the passing of useful information in an understandable form from one person to another. Talking is not necessarily communication. Each of you has to desire that the other be aware of how each person feels and thinks about the project. Do all you can to get face to face. Leaving notes will work only on very little items, and then not always as you intended.

Current Knowledge of the Project

- What has the prospect done to become familiar with the full nature of the project?
- Are there plans or sketches of the project drawn up?
- Is there an estimate of the project cost by someone other than the prospect?

Decision Maker for Project

- Has a final decision been made to do the project?

Be clear and firm that you have to work with whoever the decision maker is for the project.

- If the decision to do the project is not solid, what has to be done to make it a solid decision?
- Who will make the final decision to do the project?
- Is there a deadline for the final decision?

All of these questions may actually seem to be a way to remove prospects from consideration. This is true! The greatest waste of time you will experience is a prospect who wants you to work up bids and estimates, but turns out not to have a serious interest in doing a project.



Tip

Spend your time with serious prospects only. Do not bid and estimate in detail until the prospect has provided detailed plans and specifications to work from.

3. Gather Information

Once you have a qualified prospect, you want to gather all the information you can about their project. The information you gather has to deal with basic questions you have about the project:

1. The prospect said they wanted to do a specific project. Do they really mean it?

If the prospect sincerely wants to pursue the project, they will cooperate in helping you gather information for the project.



Note

If the prospect finds it hard to give you definite answers about project details, they may not have made a serious decision yet.

What is the “key issue” about this project? What is the “difference you can make to your customer?”

2. Is this a project you want to do? As you gather information, you may find that the project is not one you are good at or it may be out of your area of expertise.

You have to determine early on if you might be taking on a project that will give you problems.

Is the prospect someone you feel comfortable working with? Some people are so “picky” that you will never be able to please them! Are these or other irritations possible:

- Are their children "little demons" who might hamper your progress?
- Do they have numerous pets that you will have to contend with?

Pay attention to your intuition!



Warning

One workman left his truck door open while he was working on a project. He had also left his lunch sack in the front seat of his truck. When lunch time came, he found out that the family cat had eaten most of his lunch (except for the apple)!

The best sales people spend 60% to 70% of a sales call listening to what the customer has to say, according to a study done by the Van Vorden Group

3. Is this a project you can do within the time frame the owner has laid out? Do you have other projects coming up that will cause problems in completing this one if you get it?

If a time conflict comes up, find out if the project can be worked into your schedule. Do this early on so you know your sales work will not be wasted.

Selling Exactly What Your Customer Wants

You want to gather detailed information on all aspects of the project. Your prospect has to clearly communicate what they want. It will do you no good to assume what the prospect wants only to find out later that your presentation includes items the prospect rejects.

The best way to eliminate confusion is to use a detailed estimate take-off process. In every case where a choice is possible, ask the prospect what their choice is.

The Academy sells an Estimating Form Kit with all the forms necessary for detailed take-offs. See the Bibliography on page 89.

Formal education, type of career, or upbringing seem to have little to do with the ability to visualize a completed project. Contractors, designers, and architects have great difficulty helping their clients through this visualization process. When the owner and the designer are having difficulty communicating, the process flounders. Only more communication of different types will unravel the mystery and project a correct visual image.

Questions

Many questions may come up during the course of gathering information. These might include:

- Is the color of an appliance available in stock or does it have to be ordered?
- Can the existing foundation handle the weight of the proposed addition? If yes, who said so?
- Will the desired new locks fit the existing doors without modification? Look and see for sure.
- Will the general contractor or owner have access to the project even if it gets muddy?
- If the project gets muddy, can the work be continued? What would have to be done to the site?

You want to know that your part of the project is completely in order.

Can You Do It the Way the Customer Wants It?

The last item you want to be sure of, as you gather information about the project, is whether you can do the project the way the prospect wants it done. Doing it the way the prospect wants it done might include:

- Are there special hours you cannot work during the day?
- Are there special problems with noise, dust, access to the project, or parking?
- Is there an absolute project completion deadline? What are the penalties for failure to meet the deadline?

Make certain you have all the information before you make up the contract. An error in gathering information may put you in a difficult position if your contract is accepted.

A lot of schmoozing by the sales person implies that they are mostly talk and little knowledge or help.

4. Present Your Offer

This is it! You now present your offer in the form of a proposal, a bid, or an estimate. Now the prospect can accept your offer and you have a contract.

**Tip**

One of the most useful tools you have for selling a project is a complete proposal, bid, or estimate form with a professional letterhead and your business card attached. In fact, these forms can become your sales tract to take you to the close of the sale. Pictures of similar projects that you have completed are also valuable sales tools. Be prepared to offer references from completed projects.

People don't buy for logical reasons. They buy for emotional reasons.

The Sales Appointment

You want the sales appointment (when you present your offer) to be the only time your offer will be considered by the prospect. Do not set this appointment up for any other reason than the final consideration of your proposal. By this time in the process, you should have all the details of the project spelled out in your proposal, bid, or estimate.

**Note**

Tips on the use of contracts and samples of contracts you can use for presenting your offer are available in the Academy's Contractors Contract Kit. See Bibliography page 89.

Six Rules

Six rules will help you get through the sales appointment with the most success. These six rules are:

1. Make the sales appointment only when all concerned parties can be there.

The sales appointment is for making a sale. If anyone who has to be there to approve the sale is not there, you will not achieve your goal. Do the sales presentation only once.

"80% of success is showing up."
Woody Allen

**Note**

In reality, there may be some times when a second appointment is necessary. However, you should never start out making a sales appointment with the option of more than one appointment in mind.

This is as simple as following up on all of your promises for information. Most contractors won't do it.

2. Be sure all concerned parties will be there during the entire sales presentation.

The first part of the sales appointment process is to sell the interested parties on the idea that this is the sales appointment.

During this appointment there will be a decision made to buy. In setting the sales appointment, you have to find out who needs to be there and be assured that they will stay for the entire presentation.

**Tip**

During the process of gathering information, you might make it a point to find out who makes the decisions so you know who has to be at the sales appointment.

Customers want to feel **trust, care** and **concern** when they deal with a contractor. Don't let them down.

3. Assume that your presentation will take two hours.

Get agreement from your interested parties that they have to set aside two hours (or whatever time you need) for the sales presentation. During the allotted time you should be prepared to efficiently present your proposal, bid, or estimate.

4. Find out as much as you can about the customer's ideas of the project prior to the meeting.

This is a reminder that every piece of information gathered is useful. You have to present the solution to the prospect's construction problem. If you did not correctly understand the project and your prospect's needs, you will be in a poor position to get the sale.

Remember, what you are presenting is the best solution to the prospect's problem. Focus on how your solution will make it easy for the prospect to complete the project the way they want it.

**Tip**

Make note of personal items in the prospect's life and ask how they came out. For example, the prospect says "I can't meet you Thursday at 3:00 because I have to take my son Jim to a softball game." When you see the prospect next time, be sure to ask how the game came out.

If the prospect says "I got a promotion, so we can include skylights and new windows in the project," when you come back with the new figures be sure to ask about the new job.

5. Be sure the project to be done is to be done now (started within a few weeks).

In order to close a sale within the two hour appointment, both you and the prospect have to want to find a solution now. If the prospect is not committed to doing the project now, you cannot sell now. You are wasting your time.

As stated, you should have uncovered this information before this time. However, if you determine that there is not an urgency to do the project, you might as well not schedule the sales appointment.

When to say “no” to a sale: 1. It was too easy. Is it all for real? Any mistakes? 2. Your customer sounds like a dictator. Everything is as they want it. If it “feels” bad, it probably is. 3. The project is too big, too small, too complicated and in some way will cost you. 4. This sale is good for your ego, but lousy for your business. 5. Payment terms will be too adverse.

6. Ask your prospect if they will be paying cash or how they will finance the project.

If the prospect does not have a source to pay for the project now, you are unlikely to get the sale. Prior to making the appointment, you have to know that the prospect has funds in some ready form to pay for the project.

The Photo Presentation Manual

One of the best ways to present your proposal, bid or estimate is to use a photo album of your past projects and other photos that are close to the type of project the customer is considering.

No one ever got injured on the corners of a square deal.

In addition to your own photos, collect pictures from magazines that fit the type of work you do. Use the pictures to make up a scrap book that shows variations of types of projects.

For example, a kitchen remodeler can collect pictures of:

- Cabinet designs and features
- Kitchen layouts
- Specialty items used in kitchens

Color in your presentation is useful to help the customer see what you are offering. In addition to pictures, you can use a color printer for parts of your presentation.

Special photo and picture presentation books can be put together to show the nature of the work to be done for your prospect. In addition, the presentation book can deal with potential construction problems such as how you intend to handle:

- Dust control in a remodel
- Asbestos removal in a commercial building
- Protection of the landscape

- Removal of construction debris

**Warning**

If you use your photo manual to show a process for handling construction issues such as dust, debris, or landscape protection, do not use a process that is entirely different from what your photos show.

Selling is easy if you are willing to lose money. The key to good selling is the sale that's made at a profit.

Do It Yourself Photos

You may know how to take good quality photos and have them developed and printed. If so, you can routinely take pictures of your projects and select photos to make up special presentation books for specific projects.

As with everything you show the prospect, you will want to present the best company identity you can. Be complete and professional in putting together your photo books; do not do an inferior job. A shabby looking book will not help you.

Professional Photos

You can hire a professional to take pictures for you during the course of your projects. While this is more expensive than doing it yourself, the look may be worth it.

The cost of good photo equipment is high. You may want to invest in professional photos rather than buying equipment and arranging for development and printing.

5. Negotiate

During many sales presentations there is a need to consider negotiation. This means you will often be asked to consider changing aspects of your presentation because of price or because the prospect wants to make a change in the project.

When this happens you can usually make a choice to do one of two things:

- Attempt to suggest an alternative right now.
- Schedule another appointment for consideration of the change.

Let your customers know how to get in contact with you. Show them you are wanting them to call with questions.

Construction projects often require negotiations when the prospect discovers the proposal, bid, or estimate has come in different than was expected. Do not lose sight of the fact that these negotiations are

often just a part of the project's sales process.

Offer Solutions

You may have to work with your customer to explore solutions to some details of a project. An aspect of the negotiation part of the sales process is offering useful solutions that will point to the close of the sale.

The idea is to let the customer know you are interested in making sure that their desires for the project are met. The project has to come as close as possible to meeting their needs. You will not complete the sale if the prospect cannot find a workable solution to their problem.

The completion of the negotiating process can be called the "meeting of the minds." Negotiation helps to assure you and the customer that an agreement can be found on the details of the project. Changes to the proposal, bid, or estimate negotiated now to make the project work, will not likely come up later to present problems.

Hold up on the bells, whistles and glitz. People want interesting and believable pre-sentations.



Tip

Use the word "you" as often as you can:

Say: "You have asked a good question."

Not: "That is a good question."

Say: "You can see the importance of..."

Not: "It is important that...."

6. Deal With Objections

Objections to the sale are a normal part of the sales process. If you do not receive some objection to your sales presentation, you may have missed something. The prospect may feel they have found a way to take advantage of you. Seldom will you find the prospect ready to buy instantly with no objections of any kind.

Your best means of handling objections is to stick to the reasons for the project as the prospect sees them. You will have to be completely familiar with the motivations of your prospect to do this. Remind the customer why they want to do the project.

The prime reason for the prospect to act on your proposal, bid, or estimate is because it is the correct solution to the prospect's problem. Your sales presentation and answers to objections have to focus on how your proposal, bid, or estimate best solves the

"There is hardly anything in the world that someone cannot make a little worse or sell a little cheaper."
John Ruskin

Never take any rejection personally. You may never find out the real reason the sale didn't go through, and it is almost never because of you personally.

prospect's problem.

Answering Objections

The intent of the objection from the prospect is to present a block to the sales process because of a negative feeling they have to completing the sale. You have to find out what is causing the negative feeling and present an alternative to make the prospect feel better.



Note

Decisions to buy are based on emotion and feelings. At this point in the sales process, logic and reason may not complete the sale. You might have to deal with the resistance that your prospect may have to buying, even though they may dearly want the project. Emotions and feelings now have to be dealt with. Go back to the main reasons why the prospect wants the project and work through them.

"The price is too high."

Sometimes the prospect does not see the value in exchanging their money for the completed project. Your response to this objection should be to ask "What can we cut from the project to make it work for you?" The answer to this question will usually reveal what the prospect does not value.

To win a loyal customer you have to offer something more than a discount.

"I have a lower cost proposal."

You will often find yourself in the position of the prospect having a proposal, bid or estimate for a lower cost than yours. Your task is to review the other proposals with the prospect to be sure they include every item of the project that you have included.

After reviewing the proposals you will want to point out those special areas where you have found solutions that go beyond the others. You can also remind the prospect of the extra value of the references you provided, the skills you bring to the project, or other valuable aspects of your proposal.



Tip

When price is the only consideration the prospect has, and you are not the lowest bidder, the best thing to do may be to abandon the sale. Sometimes people who want the "best price" keep pushing for lower pricing or extras.

7. Close the Sale

Ask for the Sale

As stated, you control the sales process. Asking for the sale is the last part of the sales process. Many contractors have great difficulty with this step. Often the closing question is not asked and the sale is not made.

You may be unwilling to “pressure” someone to buy. A close is not pressure. It is a simple request to make a decision to buy. Reluctance can feel like pressure to a customer.

Remember your own sale example. What did the sales person say and do to get your agreement to the sale?

You can use closing questions that you find most easy to ask. Examples you might use are:

- “When is the best time for me to schedule the change of the locks? I have time available next Tuesday morning or Friday afternoon.”
- “I have checked the weather forecast. We can start the demolition next week. Can you have the carport empty by then?”

The proposal, bid, or estimate can also come to your rescue here in helping you to close the sale. Getting agreement on certain points of the proposed contract sets up a flow of questions and answers that can lead to acceptance of the sale.

For example, you can use closing questions such as:

- “Your new locks include re-keying to match the entry door. Do you have an extra key for me to use?”
- “Your project includes two new trees near the deck. Which species of tree did you select?”
- “The concrete block company has a sale now on the split-face block you preferred at the same price as regular block. I would be happy to reserve enough split-face block for your foundation.”

80% of your prospects are people who don't like to make decisions. Your job is to assist them in making their decisions.

Follow the Sales Process

The sales process has to follow selling steps just as a building

process has to follow construction steps. The easiest way to get the sales job done is to follow the selling steps in order, doing each one completely.

A “soft-sell” is leading the customer along a series of “soft” steps to an easy and comfortable decision to buy from you.

The Basics for the Sales Process Are:

- What do you want from this project?
- How can I be of help?

Selling All the Time

You will find selling easier when you make it part of your normal business activities. Anyone you meet anywhere is a potential prospect. Talk about what you do as a contractor with the idea that any person you talk to could buy right away.

You may be pleasantly surprised from time to time.



Tip

Always have a business card handy to give someone you meet.

How to Blow the Sale

Don't Follow Up

Drop off the proposal and wait for a phone call from the prospect.

Talk Negatively About Your Competition

Talk about the problems and faults of your competition. People do not want to do business with a complainer.

Don't Listen

"Forget" some items on the proposal that the prospect wanted in the project. If you do not get it right now, how will the prospect trust you in the future?

Don't Prepare For A Sales Call

This is it! If you cannot get ready for the sales call, how will the prospect buy?

On the average a one-in-three closing ratio to appointments held is good. If you sell more than half, you might want to raise prices.

The Data Base

One of the best selling tools you can make use of is the simple data base. A data base holds the names of all your sales prospects. You can arrange the names to fit into categories according to the seven steps of the sales process.

Your data base can be as small as a well organized card file, to as large as a computer software program. As with all sales tools, you have to use it if you want it to work.

Index Cards

The data base allows you to keep records of all:

- Prospects you want to keep in touch with regularly
- Customers that might want more work done
- People who are good referral sources that know about your work
- Selected new names that you want to develop into customers.

Use some or all of the seven sales process steps as your index headings, and add other categories as you need to. See sample index card, Exhibit 2 page 24.

Some sales may be lost for reasons beyond your control. Understand and accept them, then move on to other prospects.

Exhibit 1: Sale Process

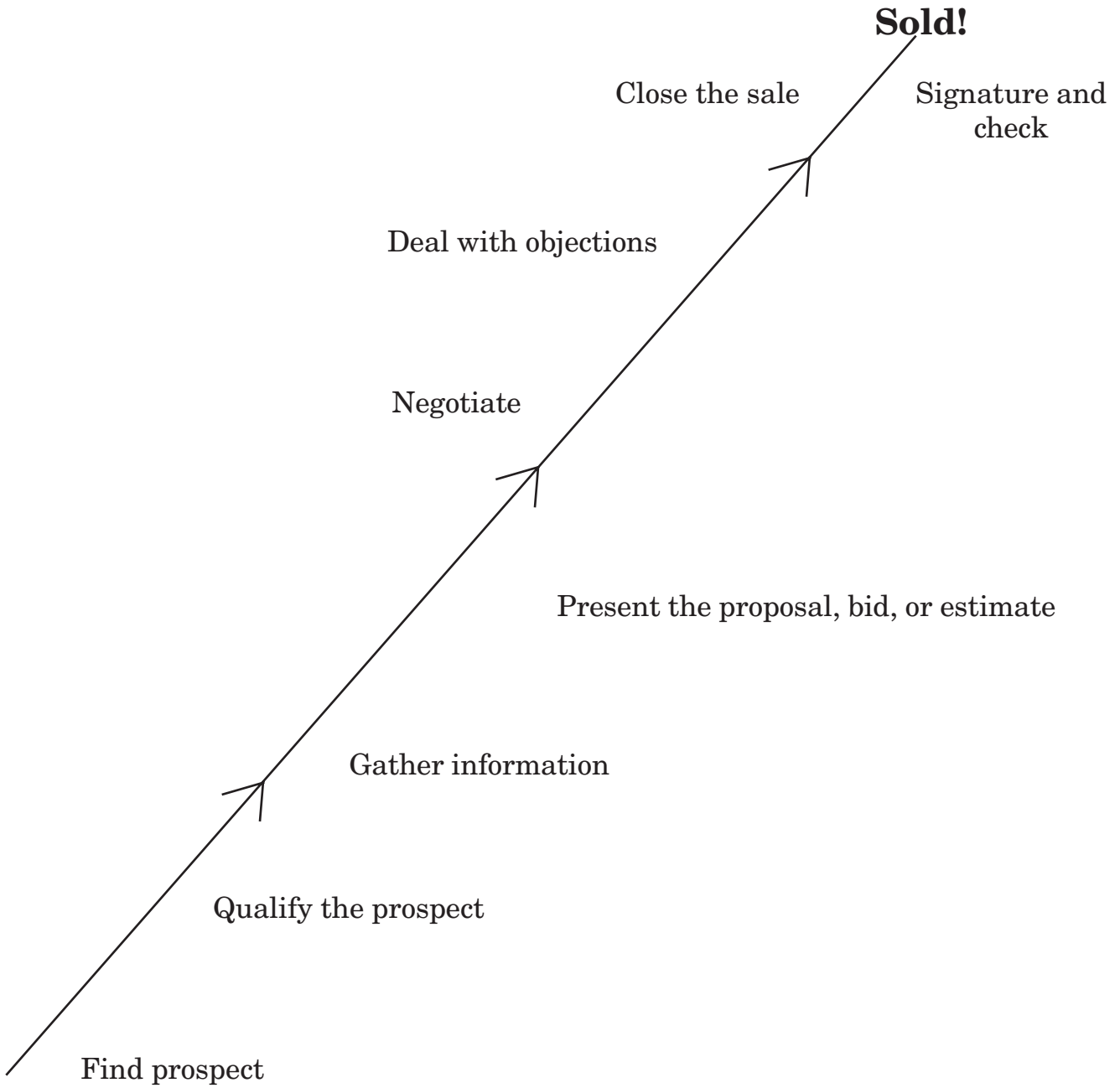


Exhibit 2: Sample Index Card**Front**

Date I Started With This Prospect:
Name:
Address:
Phone:
Referred By:
Comments:

Back

Contacts:		
Date:	By:	Results: