

Stop Quoting & Start Selling!



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CONTENTS

01

Do you
quote or do
you sell?



02

Estimates
VS. Proposals

03

How many
touchpoints do
you need to get
a deal?



04

How many deals
fall through the
cracks?

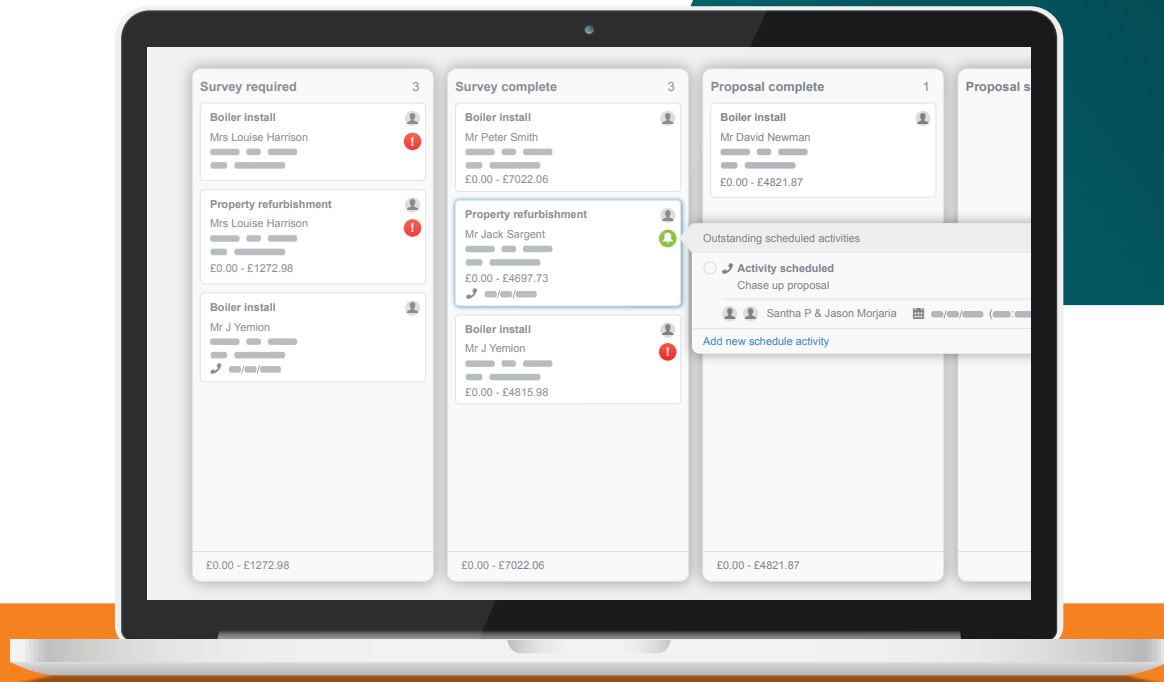


05

Where is your
sales strategy
going?



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Automate like a pro

Don't just send quote after quote. Track the sales process from start to finish and stand out from the competition with proposals that drive your revenue. A new sales CRM from Commusoft, launching in 2022.

- Build sleek proposals in minutes with a drag-and-drop builder & convenient templates
- Schedule & automate follow up calls, emails, and tasks to stay on top of your opportunities
- Report on sales to learn why you win or lose opportunities, who sells the most, and how much you're earning

**Discover Commusoft
Sales**



Step 1:

Do you quote or do you sell?

To find out, tick the boxes that apply to you:



- ☐ I send an email with an estimated price to customers - take it or leave it. ☐
- ☐ I have a surveyor who gives the customer a price after checking the job. ☐
- ☐ I price according to my competition. ☐
- ☐ I want to charge more but I don't think my customers will accept it. ☐
- ☐ I contact potential customers whenever I think it's right. ☐

If you've ticked more than 2 of those, then congratulations! What you're trying to do is sell, but what you are *actually* doing is quoting.

What do you mean? Are they not the same?

quote verb



quoted; quoting

Definition of quote

Sending people a price break-down

sell verb



sold; selling

Definition of sell

Building a relationship with a potential customer by tracking communications and sending the right proposal at the right time



Step 2:

Estimates VS. Proposals

Spot the difference between these two images:



Burleson Plumbing & Heating

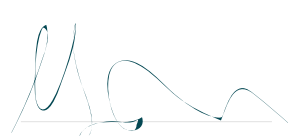
Qty	Materials	Price
	Air Bladder Tank	
	Pump Model	
	Pump Serial	
	Motor	
	Date Code	
	Extended Insurance	
	2 HP Deluxe Control box Contractor CB204112MC	192.46
	3 HP Deluxe Control box Contractor CB204112MC	216.07
	5 HP Deluxe Control box Contractor CB204112MC	325.78
	AW150 Pump tec (2 wire or 3 wire pumps) 1/3HP	155.9
	AWQDP Pump tec (3 wire pumps) 1/3HP-1	112.08
	2 Wire splice kits	1.94
	3 Wire splice kits	2.63
	4 Wire splice kits	3.12
	3 Wire #8 splice kits	7.06
Total		1900.00

Kitchen and Bath Fixtures

Casey Young
214 North St.

Quote #1000
Sent on 2022-07-06

Product/Service

Description	Unit cost	Qty.	Total
<input checked="" type="checkbox"/> Kitchen Faucet Option #1 Rohl Graceline pulldown kitchen faucet with metal lever handle See image	1350.00	1	1350.00
<input type="checkbox"/> Kitchen Faucet Option #2 Brizo Litze kitchen faucet with arc spout and knurled handle See image	760.00	1	760.00
<input checked="" type="checkbox"/> Powder Room Sink Option #1 Kohler iron plains round drop-in bathroom sink See image	550.00	1	550.00
			Total price (exc tax) 1900.00
			Tax (0%) 0.00
			Total 1900.00

This proposal is valid for the next 30 days


The quote:

- Less professional
- Price lacks context
- Forgettable if you're competing with other providers
- Doesn't offer options

The proposal:

- Looks professional
- Offers options (premium & budget)
- Provides images and context for price
- Includes a time-based offer to encourage decision





If you send out **50 quotes/week** and spend **10 - 15h** working on them, but only 1 gets accepted, then you've **wasted 98%** of the work you put into it.

A sales proposal is so much more than a quote. It's a representation of who you are as a company and shows off what you can do for a customer.

Cutting corners here is the equivalent of cutting corners on any other type of work and the customer will be able to tell. This is an opportunity for any field service company, big or small, to overtake the competition. Some benefits of a great proposal are:

1

It's the first physical proof of your work that the customer sees.

At the end of the day, it's hard for someone outside of the industry to tell an average plumbing repair or a mediocre HVAC install from a great one. However, if you look at the two examples shown above, it's clear to anyone which company has put in the effort to be more professional.

2

It allows you to charge the price you want, not the one your competitors charge.

Good proposals give customers options. Many companies struggle with raising prices and some even take on profit losses in order to sustain a customer base. But by offering "budget - average - premium" options, not only do you satisfy each type of customer and keep your bottom line healthy, you also make them feel in control of their experience. And that's priceless!

3

It establishes a good relationship with the customer.

As in any good relationship, communication is essential. This is just one of many steps; it takes anywhere between 5 and 12 touch-points for a lead to convert into a customer (and we'll go more in detail on that in a bit). But mostly, keep in mind that a great proposal sets the tone and every follow-up matters!



SA
LE


**A B Plumbi
& Heating**

Reliable Local Plumb
All types of Domestic & Comm
Boiler Service & Repa
Burst & Leaking Pipe
Central Heating
Blocked Drains

What to include in a great proposal

- ☐ Your logo
- ☐ Your company information
- ☐ Proposal number and send date
- ☐ Customer name and address
- ☐ Product images and info
- ☐ Product and price options
- ☐ Time-sensitive offer
- ☐ Add-on products (full-price, discounted, or free)
- ☐ Total before and after Tax
- ☐ Labor rates
- ☐ Digital signature box

Angular Stop Cock with
Flange

Cat. No.: 210708

Concealed Stop Cock with Wall
Flange

15mm Cat. No.: 210705

20mm Cat. No.: 210706

15mm Re. Cat. No.: 210707

Wall Flange

Bath T

20% Off

10
days

13
hrs

16
min

59
sec

BUY NOW



Step 3:

How many touch points do you need to get a deal?



71%



of buyers believed that their relationship with the seller heavily influenced their decision to buy

It takes between **5 and 12 touch points** to get a deal signed. To build a stronger relationship with your customers, you need to:

1

Provide context.

How many times did you see the customer's face change completely when they read the final price for a job? It's not because your prices are too high, but because the average customer has no idea what changing a filter or installing new sockets costs. All they see is you charging a lot for a 1-2h job.

Good communications, through well-written proposals and timely follow-ups, will help customers better appreciate the years it took to gain the expertise to do the job in 1-2h, as well as the level of quality you offer.

2

Personalize to their pains and needs.

You've probably heard that it's all about the why, not about the what and that's because it's true! Customers care about the benefits you can provide for them and that you can solve their problems. For instance, they care that a better heating system will eventually pay for itself because it saves them 20% on their monthly bills.

Communicating this well is essential but it will take more than a single email or phone call. Selling, especially on the bigger jobs, is a lot more complex and each interaction (touch-point) is important.

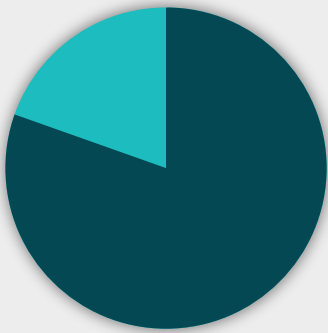




Ask yourself:

Are you following up as much as you should be?

Probably not, says Sales Handy:

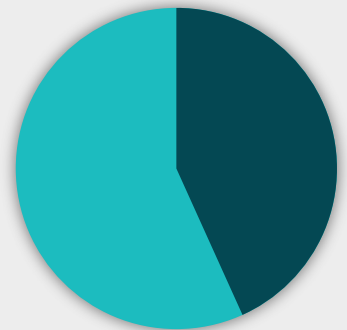


80%

of sales require five follow-ups

44%

of sales reps give up after one follow-up



What does this mean?

A lot of companies lose out. Not because of a cheaper competitor, or for lacking the expertise, but because they didn't take the time to send a couple of reminders to their prospects. As a result, the customer will shop elsewhere and who could blame them?



Action item:

Analyze your last 20 leads and count how many times, on average, you contacted them before they converted or you considered lost.



Step 4:

How to stop these deals from falling through the cracks?

How customers hire a field service company the process is a lot more complex than, say, buying a new TV. It goes double for bigger projects, like commercial contracts or home renovations where more money is at stake; establishing trust is even more important.

Identifying each stage of this buying journey will help you get a better understanding of what the customer expects from you. These can vary from business to business, but a general process would look like this:

Inquiry made

Survey booked

Survey completed

Proposal sent

Follow-up sent

The screenshot displays a CRM dashboard with four main columns representing stages of the customer journey: 'Survey required' (4 items), 'Survey complete' (3 items), 'Proposal complete' (1 item), and 'Proposal sent' (12 items). Each item is a card showing customer details, service type, and value. A modal titled 'Outstanding scheduled activities' is open in the foreground, showing a list of activities with a radio button for 'Activity scheduled', a follow-up note, and a list of assigned staff (James B & Sarah C) with a calendar icon and a time slot. A link 'Add new scheduled activity' is at the bottom of the modal.

Survey required	Survey complete	Proposal complete	Proposal sent
Boiler install Mrs Louise Cooper £1,272.98	Boiler install Mr Peter Smith 1,250.00 - 1,975.00	Radiator install Mr Dinesh Shami 321.87	Property refurbishment Mr & Mrs Carter 2,488.00
Property refurbishment Mr John Green 1,272.98	Property refurbishment Mr Jack Carlton 4,697.73		Boiler install Mr John Stapleton 1272.98
Boiler install Mr J Yemion £1,272.98	Boiler install Mrs Ellen Prior 1,815.98		Boiler install Mr John Forest 1272.98
Radiator install Miss Daisy Hightown £1,272.98			Radiator install Joan Carrington 0.00 - 478.98
			Property refurbishment Fairmount Inn 751.74 - 21,383.23

Outstanding scheduled activities


- ☐ **Activity scheduled**
- Follow up with remaining questions
- James B & Sarah C
- Add new scheduled activity



With this in mind, time is of the essence. Each of these actions needs to be timed correctly so that you strike a balance between making a potential customer feel heard and avoid irritating them with too many communications.

For example, when a customer calls or sends an email to enquire about a job, availability, and price, how quickly do you respond?

According to Harvard Business Review:



New leads are **9 times** more likely to convert if you follow up within the first **5 minutes** after they express interest

If you wait 30+ minutes, your lead is 21 times less likely to turn into a sale. Speed is essential.

However, if you've already sent a proposal and you haven't heard back from someone, it's important to be patient. The best practice is to wait 3 - 5 days before sending a follow-up. You can send a second follow-up 10 days after the second one.

Organizing a sales process like this to target each stage of the buyer's journey takes time, dedication, and a growth mindset. But there's a way to make it easier!



Step 5:

Where is your sales strategy going?



Winning work is a vital part of your business and the advice above will go a long way in helping you get more customers and bigger jobs, but maintaining growth comes with its own challenges, too.

If you're ready to scale your sales efforts, you need to make sure you remain in control at every step. **This will require:**

- Sleek proposals with customized branding, pricing options and add-ons
- A record of every lead and opportunity coming through
- A tracking system that follows the buying journey (also known as a deal board)
- Commitment to schedule follow up calls, emails, and tasks for every lead
- Reports to learn why you win or lose opportunities, who sells the most, and how much you're earning from each deal

If that sounds like a lot of work, that's because it is! But there are tools to make things easier, from using proposal templates to digital to-do lists.

Either that or you could have everything in one place with Commusoft's new Sales CRM.

Don't aimlessly send quote after quote. Track the sales process from start to finish and stand out from the competition with proposals that drive your revenue.

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Sales**

