



## IN-PERSON QUOTE PRESENTATION PROCESS

Prior to your In-person Quote Presentation, ensure you have:

- Qualified the Client
- Prepared the Quote/Estimate
- Have plans on hand
- Have brochures/materials on hand to use throughout the sales process
- Have the above in a branded folder to present

Then follow the below process:

1. Show up on time and re-connect from your site visit
2. Start with the cover page of your quote - cover a bit "About Your Company"
3. Second page - highlight your Value Added Benefits
4. Then proceed through the quote, line by line explaining each aspect of the project. Use the plans to "create the picture" for the client to see.
5. On the last page, then show them the price and say:

*"So for your project the total investment is"....[show them the price]*

*If you feel you need to say something, lead in with: "So how does that price sit with you?"*

*Wait for any feedback, questions or comments - Use the Objection Scripts here.*

*\*Note - we want them to ask questions so we can help satisfy their concerns and needs to help lead them to a decision sooner.*

6. Once we have completed the quote presentation, lead in to tell them the next steps.

*"So from here, this is what happens next...."*

7. Then ask what they would like to do. (i.e. follow up call in a few days, pay a deposit and get moving, speak to their partner etc)