



# Residential & Negotiated Workflow Procedures

*with*

# TONY THORNTON





**EFFICIENCIES = PROFITABILITY**

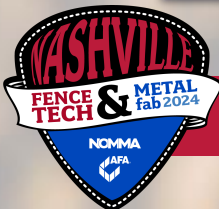
**WHAT ARE THE COMPANY  
AREAS  
OF EFFICIENCIES?**





# EFFICIENCIES = PROFITABILITY

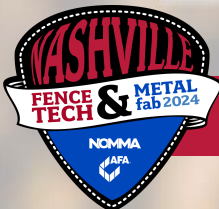
- Efficiencies in ADMINISTRATIVE
- Efficiencies in SALES/ESTIMATING
- Efficiencies in OPERATIONS/SCHEDULING
- Efficiencies in INSTALLATION/PRODUCTION





# EFFICIENCIES = PROFITABILITY

- The term EFFICIENCIES can also be PRODUCTIVITY
  - Without PRODUCTIVITY, profits will suffer
  - Most ONLY think about productivity being INSTALLATION
  - Evaluations of ALL areas must be performed





# EFFICIENCIES = PROFITABILITY

- Before Efficiencies can be established
  - A PROCESS must be developed AND defined
    - Definition of PROCESS- “a series of actions or steps taken in order to achieve a particular end or outcome”





**EFFICIENCIES = PROFITABILITY**

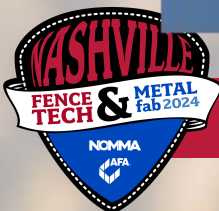
**PROCESS = WORKFLOWS**  
**“passing on SUCCESS”**





# EFFICIENCIES = PROFITABILITY

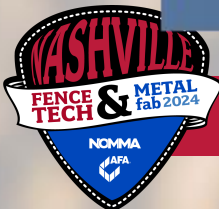
- PROCESSES will be defined in all 4 areas
- PROCESSES will be different for each company
- PROCESSES is a MUST before EFFICIENCIES will occur





# EFFICIENCIES = PROFITABILITY

Goal is to achieve efficiency through defined workflows and procedures



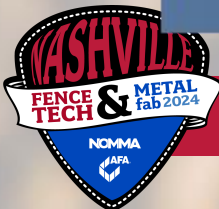




**EFFICIENCIES = PROFITABILITY**

# Efficiencies in ADMINISTRATIVE

*“incoming calls and financial closeout”*





**EFFICIENCIES = PROFITABILITY**

# Efficiencies in SALES

*“everything starts with a sale”*





**EFFICIENCIES = PROFITABILITY**

# Efficiencies in OPERATIONS

*“largest area of weakness”*

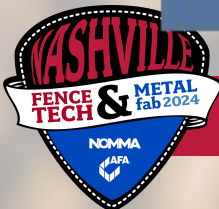




**EFFICIENCIES = PROFITABILITY**

# Efficiencies in INSTALLATIONS

*“most misunderstood”*





# Verbal Procedure

Let's do a quick exercise  
Need 4 volunteers





# Verbal Procedure

- Customer requested 324' 6" panel built, privacy board on board pressure treated fence with wood post and cement. Job will include 2 walk gates with 1 double gate and walk gate on right side will be inward swing.
- Customer must be on site when we start.





# Verbal Procedure

What is the importance of workflow/procedures and necessary documentation?

**Overall Workflow Checklist**

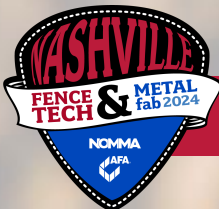
[www.fenceconsultinggroup.com](http://www.fenceconsultinggroup.com)





# Residential & Negotiated Sales

- ***A residential sale*** is a call or referred customer that needs a backyard fence
- The term ***negotiated sale*** includes commercial sales without a general contractor
- In both instances, the transaction requires the company's contract be utilized





# Initial Phone Call & Appointment

The initial phone call starts the process of the Sales Cycle

## Avoid the following:

- Pet names
- Profanity
- Harsh tone of voice
- Speaking negatively towards competitors

***NO! Final prices over the phone!***





# Unknowns and Challenges

- Fence needing to be removed
- Easements and property markers
- Trees and shrubs
- Ground conditions
- Utilities
- Sprinkler systems
- Number of corners/terminal posts
- Number of gates

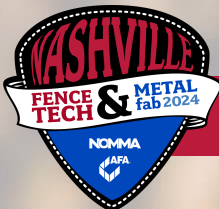
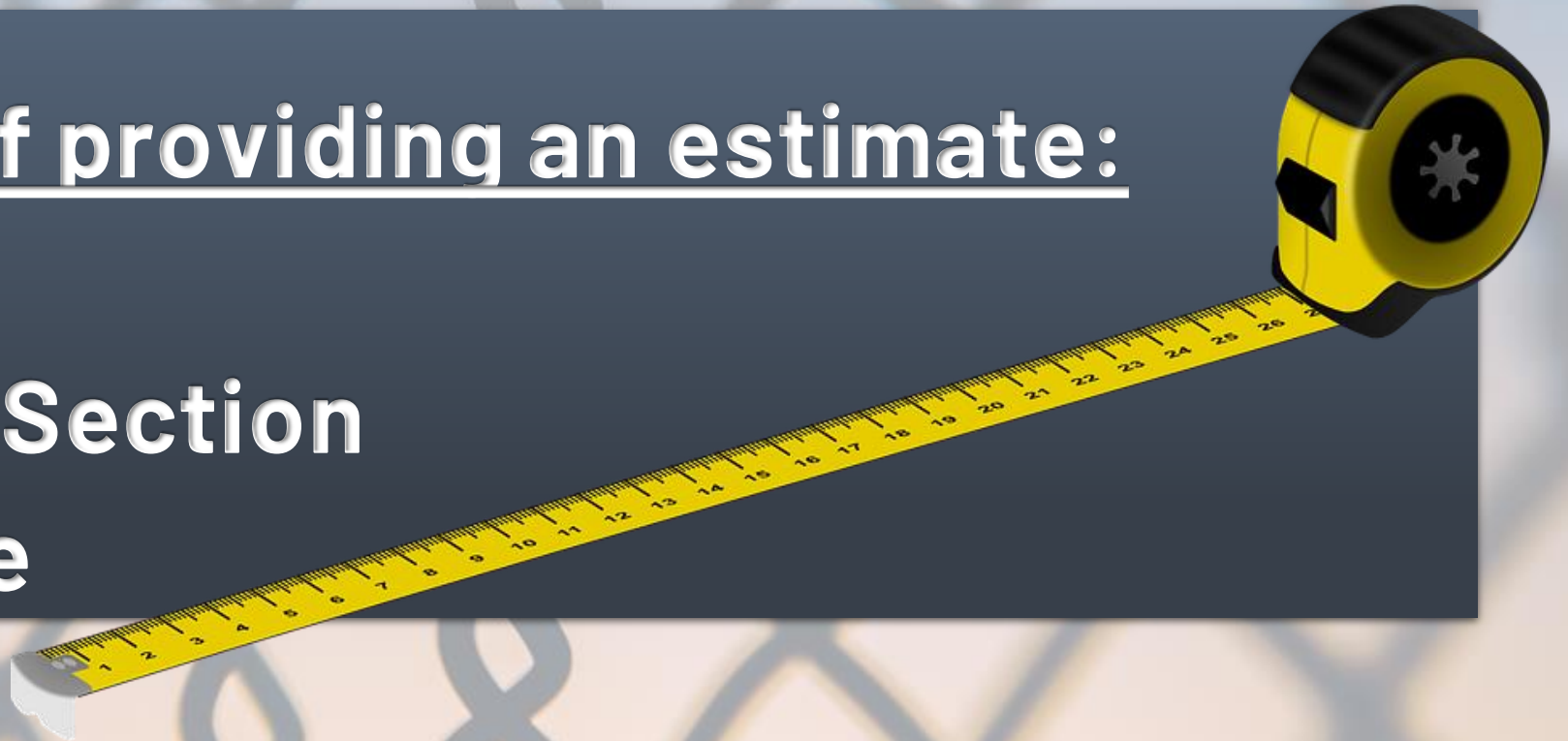




# Estimating

Two methods of providing an estimate:

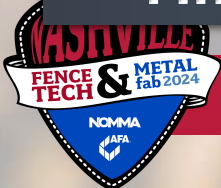
Per Foot or Per Section  
Lump Sum Price





# Initial Call Information

- Full name
- Phone number
- Property address
- Mailing address (if different)
- Email address
- Commercial or Residential?
- Type of fence
- Purpose of fence
- Number and types of gates
- Timeline for installation





# Schedule Estimate Appointment

- Proper sales scheduling is first step towards success through Administrative TEAM
- Schedule estimators in location clusters when possible
- Confirm appointments one day in advance





# Vetting & Pre-Qualifying

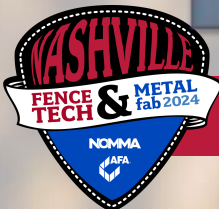
- Pre-qualifying ensures the biggest impact of time and effort
- A good pre-qualifying system reduces drive time chasing down sales leads
- Pre-qualifying is determining in advance if the customer is a likely buyer, or a data gatherer who has no immediate plan to build a fence





# The Appointment

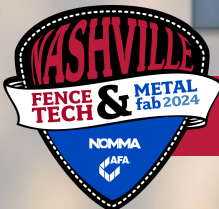
- Visuals such as truck wraps, advertisements, uniforms can present a favorable company image
- The appearance of installation crews creates an impression
- The on-site sales consultant should discuss the product selected by the customer and explain the added value of the product when installed by your company





# The Appointment

- Use a Consultative Sales approach
  - Positive Opening
  - Needs & Opportunities
  - Features & Benefits (WIIFM?)
  - Close It!

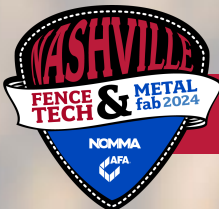






# Photographs

- Taking pictures during the estimate helps your company develop a portfolio
- Pictures provide the foreman with knowledge about the job in advance
- Photographs can be time-stamped
- Pictures can be used to resolve repairs and disputes in the months following an installation





# Follow-Up

Follow-up with prospective customers after the bid is presented until one of the following responses is provided: **1day/every week/every month**

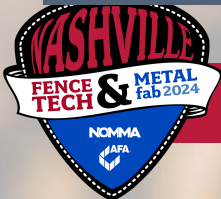
- The job was given to a competitor
- Can't afford the cost- **Don't forget FINANCING**
- Sold! You got the job!





# Walking Away

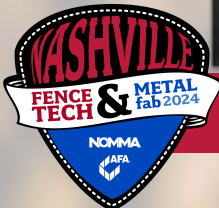
*Know when to let go of a sales proposal. If a customer will not permit you to work within your profit margins or becomes too difficult to work with, be willing to walk away.*





# Establishing Trust

- Establish Social Proof
  - Online ratings and reviews
  - Customer testimonials
  - Certifications and awards
- Professional – quality everything
- High Google ratings
- Social media and professional photos



# Recommended Estimating Software Features

- Effective estimating process
- Company contracts or work orders
- Specification sheets and shop drawings
- Drawing and site plan details for estimating
- Company or imported price list from vendors
- Customer invoicing
- Integrated Inventory Control System



# Confidential & Negotiated Contracts

- Contracts provide an expectation by the customer and company
- Contracts create a legal obligation between two parties
- Contracts reduce exposure to the risk of litigation
- Contracts provide a schedule or other terms of payment





# Workflow & Procedures

## KEY AREAS OF ORGANIZATION

- Administrative
- Sales/Project Manager
- Operations
- Installation

PASS ON SUCCESS NOT FAILURE





# Work Sheet

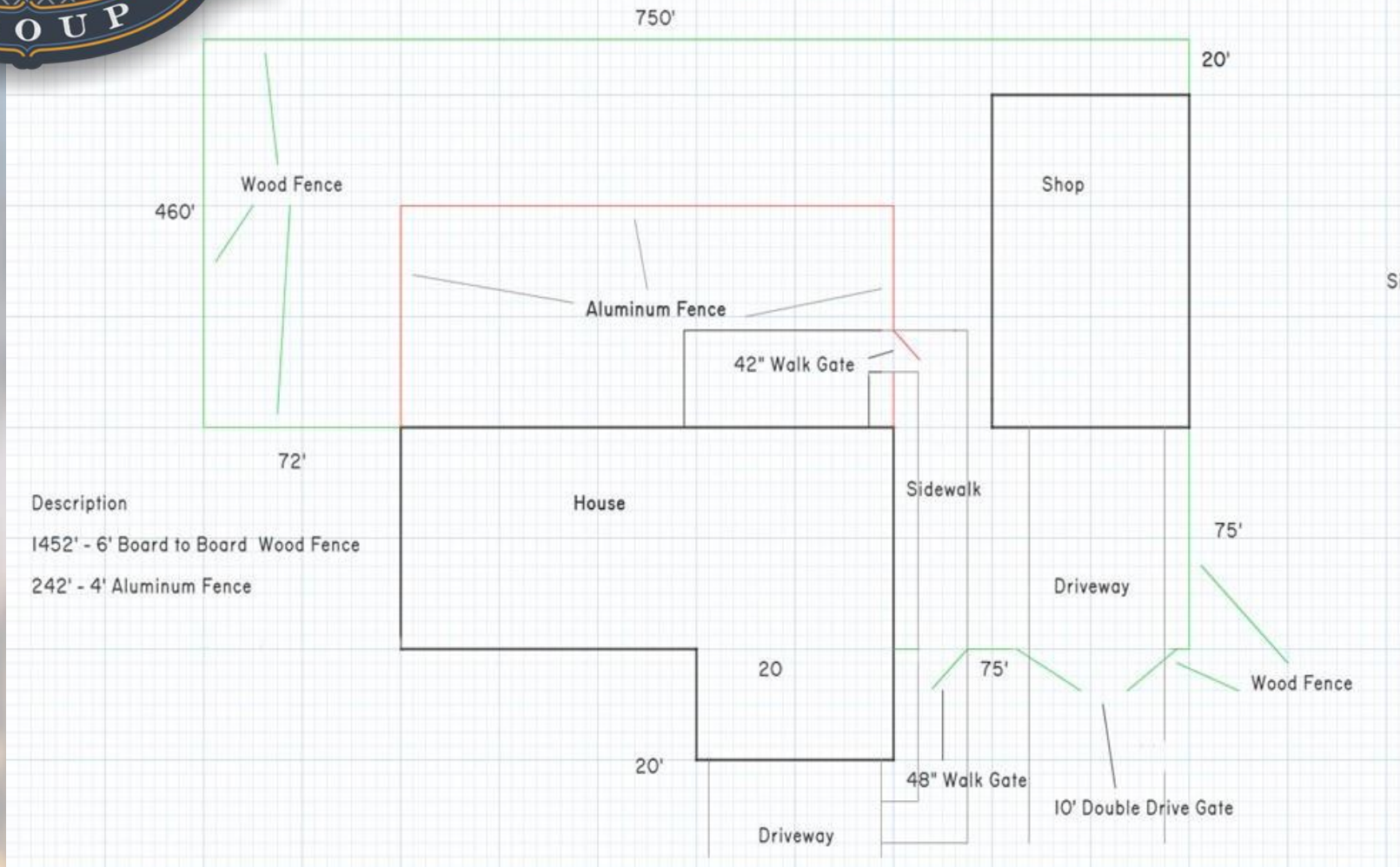
EXAMPLE







# Example Drawing



Description

1452' - 6' Board to Board Wood Fence

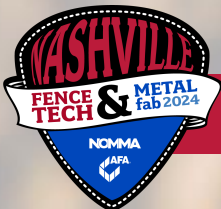
242' - 4' Aluminum Fence







# QUESTIONS & ANSWERS





Thank you.

Please complete the session survey.