



**FENCETECH**<sup>20</sup><sub>23</sub>  
**& METALfab**  
**OKLAHOMA CITY**

# Residential & Negotiated Workflow Procedures

*with*

**TONY  
THORNTON**





## 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**

The initial phone call initiates the process of the Operations Cycle.

## Avoid the following:

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

Don't give final prices over the phone!



# Unknowns and Challenges

- Concrete and 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

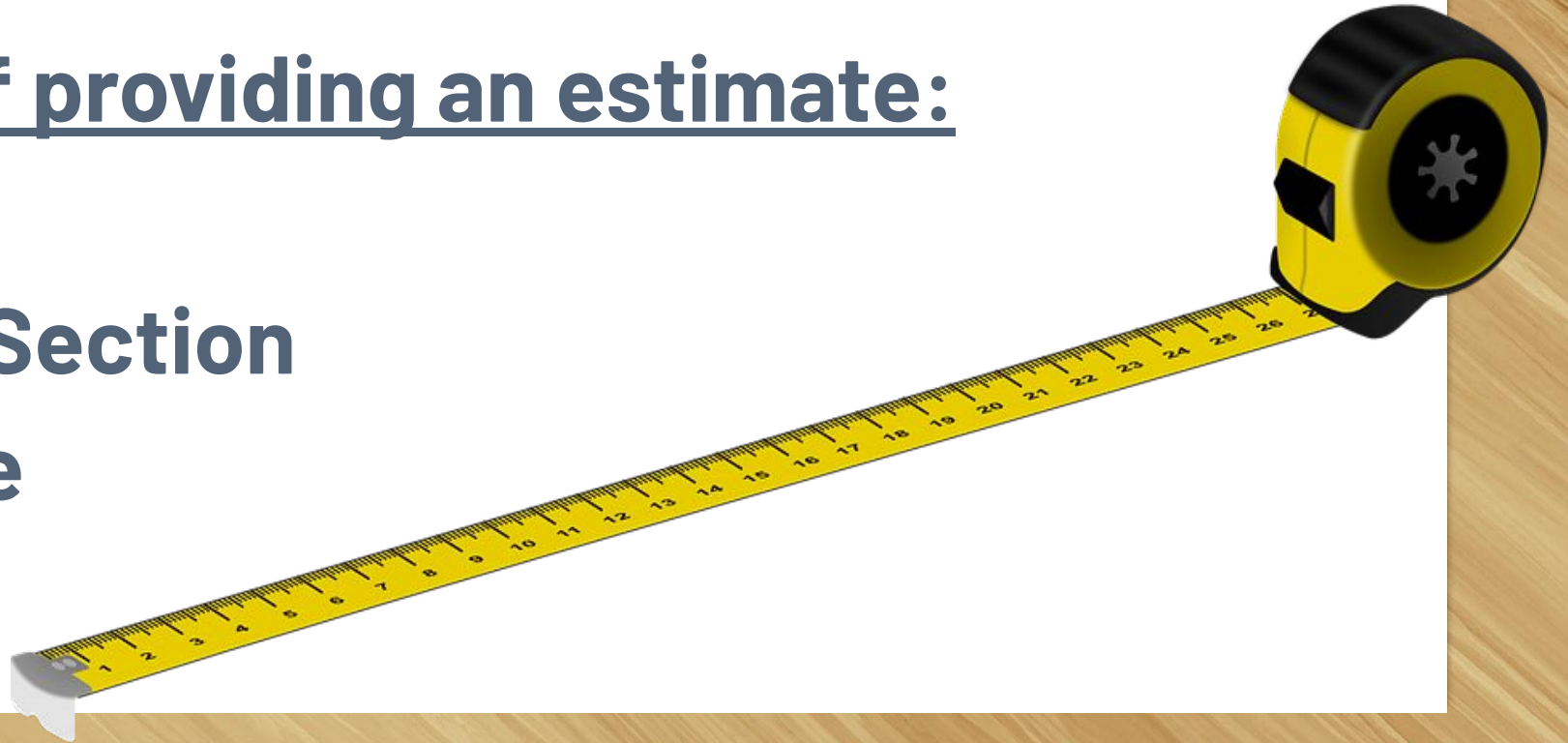




# Estimating

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**
- **Schedule estimators in location clusters when possible**
- **If multiple people answer phones, consider a cloud-based scheduling system**
- **Confirm appointments one day in advance**



## Vetting & Pre-Qualifying

- **Vetting ensures the biggest impact of time and effort**
- **A good vetting 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**



# 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:**

- The job was given to a competitor**
- The project is cancelled**
- 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**



# Residential & 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**





# Residential & 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**

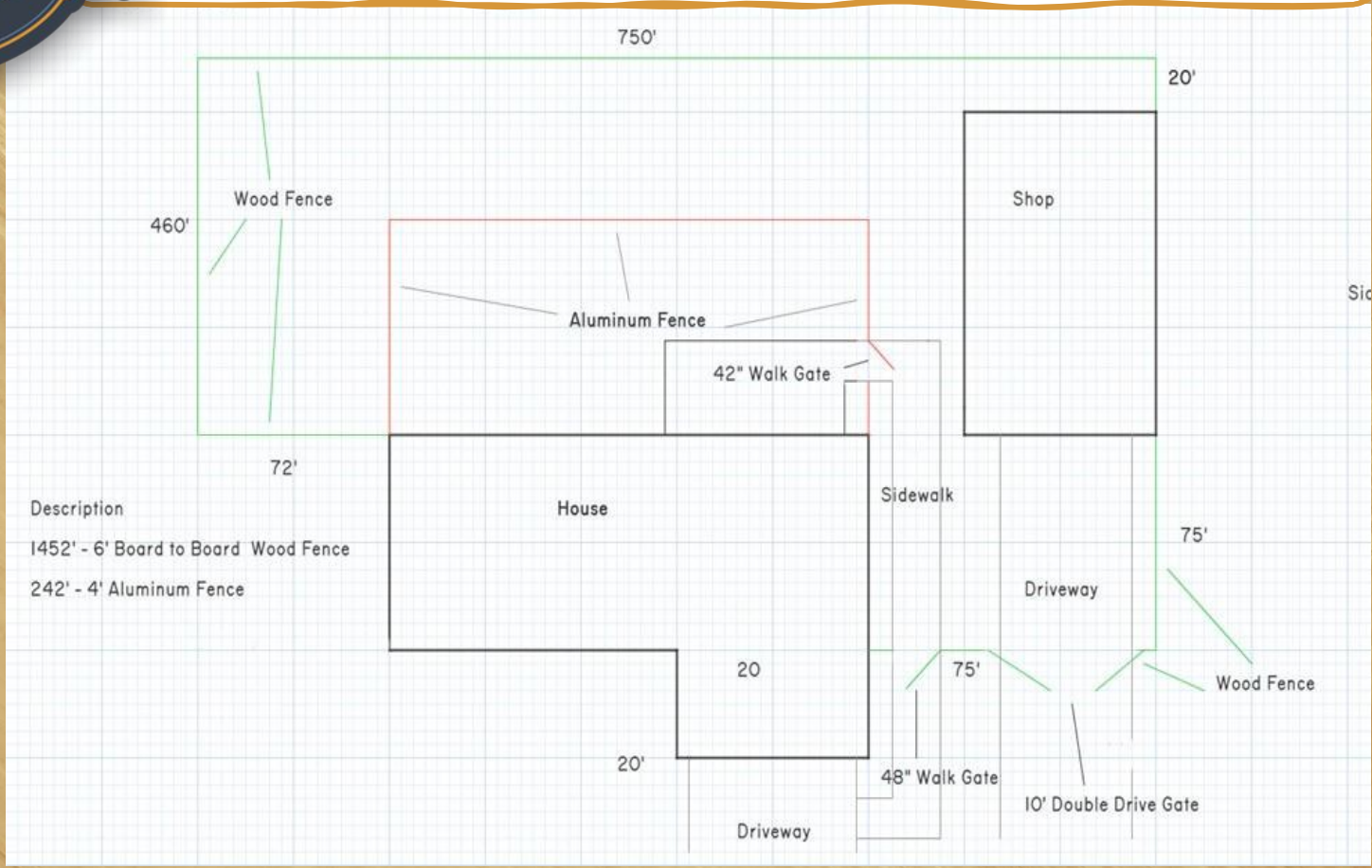
**Contracts provide a schedule or other terms of payment**







# Example Drawing



Description  
 1452' - 6' Board to Board Wood Fence  
 242' - 4' Aluminum Fence





**THANK YOU.**

Please complete the session survey.