

Effective Call Screening

by Rick Stacy

When you're new in business you lap up every call. You're hungry for work — no job is too small, too far away, or too exotic. A friend of mine, who was starting out in business, got a call during the holiday season asking if he built stars. "Stars?" my eager friend replied. "Sure...uh... yeah, I do stars," he continued with growing confidence. "Now...uh...let's see, you have your standard five-pointer, your star of Bethlehem, star of David...uh...just what kind of star were you interested in?"

Well, my friend built that star — a five-pointer, I believe — and hung it up on the peak of the client's house, fully trimmed with festive lights. But, eventually, he concluded that building stars wouldn't cover his overhead, much less put food on the table. It was time to implement a system to screen out unlikely prospects, unprofitable jobs, or just plain miserable customers.

Survival of the Fittest

The bottom line is, no matter what we advertise, there's no such thing as a free estimate. At least it's not free to us — some have calculated the cost of the estimate to fall in the range of 1% to 2% of the total job cost. As a smaller contractor, I can't afford to spend extravagant amounts of time doing estimates and remain profitable. And spending a good part of my evenings and weekends on site visits or crunching out bids at my desk exacts an irretrievable toll on family life.

My early efforts at call screening were steeped in a haphazard, hit-or-miss methodology that hinged on how much work I had lined up, whether or not I liked the sound of the person on the other end of the line, or how ornery I happened to feel that day. I had no clear system. But, over time, I developed an effective and reliable call-screening

method — one I could count on to bring in the kind of prospects I was looking for.

There are as many ways to qualify the caller as there are independent contractors. When qualifying a caller, you are trying to (a) assess what kind of customer is on the other end of the line and the type of work they are looking to have done, and (b) determine if this is the kind of customer and type of work that you want to take on. I view the qualifying stage as an attempt to get rid of the caller. If they survive "stage-1 screening," they're worth a site visit. Customers tend to call with the attitude, "Let's see if this company is good enough to do my work." The screening process provides a subtle way to turn things around so that it's you who's asking, "Is this customer good enough for me to take on?"

Categorizing callers. During the qualifying stage, I look for clues as to whether the caller is a "likely" or an "unlikely" prospect for my business. Based on this assessment, I either release the unlikely prospect, or probe further to confirm whether or not the caller is a good, likely prospect, worthy of the investment of an estimate. My goal is to ferret out answers to the following questions:

- Is this a serious prospect or do they just want to pick my brain?
- Can they afford to have the work done?
- Is this the kind of work that is profitable for me?
- Is this the kind of customer I can comfortably develop a working relationship with?

Of course, these aren't the sort of questions you can just come out and ask directly. Instead, I ask, "Can you give me some details of the project?" "What's your time-frame for getting the project done?" "How did you get my name?" "Have you checked on permits or any need for a variance with the local build-

ing department?"

To probe a little deeper, I may ask other questions: "Are you working within a predetermined budget?" "What is that budget?" "Are you getting other bids?" "How will the project be financed?"

How the caller responds to these questions helps me to categorize them.

Easy Outs

Some callers quickly end up in the unlikely category because they find my discovery questions too prying and are unwilling to answer them.

If the caller absolutely requires the job to start the following month, and I can't get to it for three months, I politely decline and refer them to someone else.

For some callers, economy is the number one concern. Comments like, "I really can't afford to pay a lot to have this done," or "I hope you're not as expensive as the last guy I called," are among the more brazen clues that the caller is not a prime candidate.

It's also important to learn how they got my name. Was it a referral from one of my customers, or a supplier or another contractor who was too busy to take them on? From experience, I know the best prospects are gleaned from referrals by my customers. I'll be slower to dismiss these prospects than someone who was referred by another contractor or supplier. These second-hand referrals, as a rule, are less likely to turn out to be good prospects.

Turning the tables. It may not be you who screens out the caller as a potential customer, but the caller who screens you off their list. And that's okay — in fact, I prefer it that way. I design my questions to steer them into making an early decision. For instance, I'll ask if they're getting other bids, and explain that I generally turn down competitive bidding because mine isn't usually the low-

est quote. I mention that most of my clients are repeat customers, and that my emphasis is on customer service and quality work. At this juncture, many prospects disqualify themselves and look for a way to tactfully terminate the conversation. This helps to weed out callers who are only price-shopping or simply following the tired advice to “get three bids for the job.” But callers who remain interested at this point move into the “likely prospect” category.

Ballpark Price List

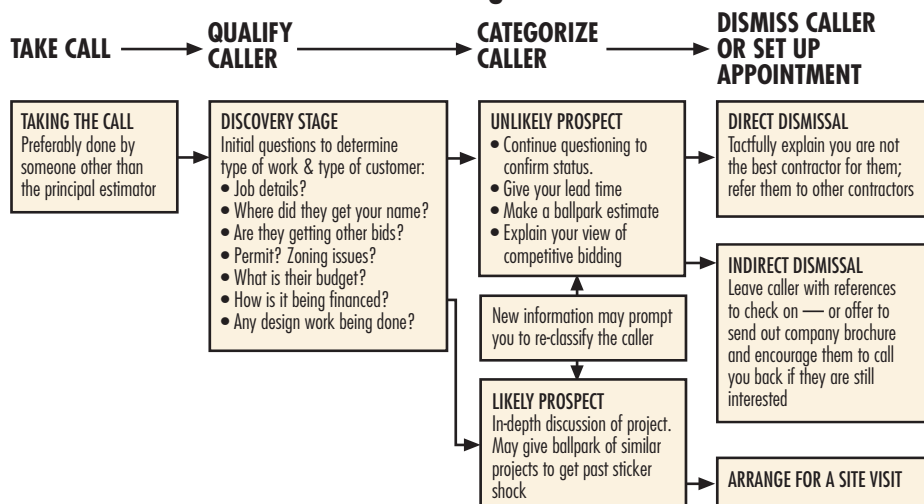
If a caller simply can't afford you, it's^S important to learn that early on, before you commit to a site visit. I keep a list handy, with a range of costs for a variety of previous projects. Suggesting a price range is also a good way to get the sticker shock out of the way with a customer who is headed toward the “likely” slot. Sample prices help to qualify a potential client without committing you or them to an actual number. I purposely keep the details of previous projects on the vague side and explain that actual costs can differ widely depending on a variety of factors. I don't want the caller to lock in on a guesstimate as the actual cost of the project.

Separate Screener

It's a good idea to separate yourself from that first contact. My wife, Amy, initially screens our callers. She's able to quickly sift out or refer the unlikely prospects. The truth is, I can be a softy once I get on the phone and will end up trying to solve all of their problems. If the caller tries to get into too many details with Amy, she can easily bow out by explaining that those are questions she cannot answer.

The object is to get as far along in the process and screen out as many “unlikelys” as possible before referring the call to the principal estimator of the company. Keep a list of questions handy as a reference for the pre-screener, or have a fill-in-the-blanks form for them to use. I follow up, within 24 hours, with a return call to those callers who survive this pre-screening process.

Call Screening Flow Chart



Handling Unlikely Prospects

There are basically two ways to dismiss an unlikely candidate. You can dismiss them directly by referring them to another contractor, or politely decline with statements like: “I’m sorry, but I don’t think I’m the right contractor for you,” or “I’m booked up for four months, so I won’t be able to meet your schedule.” I keep a list of contractors for referral, who may be just starting in business, or who specialize in a type of work I’d rather not do.

Put the ball in their court. The other way to dismiss a caller is the indirect method — that is, giving them the opportunity to dismiss themselves. Sometimes, the ballpark figure is enough to make them tell me, “Thanks, but no thanks.” But this can also put some callers in the awkward position of not knowing how to bow out gracefully. Instead, they have you visit and work up an estimate even though they have no intention of ever getting back to you. Your wasted effort is no skin off their nose. One way I avoid this situation is to encourage them to call a couple of my references for whom I’d done similar work, and then get back to me if they’re still interested. Or I offer to send out a company brochure for them to consider, and encourage them to call me back if they still want to pursue the relationship. The few who do call back become “likely” prospects, worthy of a site visit.

The bottom line is, you’re looking for a good match of contractor and client. I like to assure prospective clients that I need to be certain that I’m the right contractor for them.

Switch hitters. During the screening process, I may switch a customer from the “unlikely” category to “likely,” based on new information that comes in. For instance, after I explain to an unlikely customer that I’m not usually the lowest bidder, my frankness may strike a chord with them. Suddenly, they become animated about pursuing an estimate with me. By the same token, someone I’ve felt good about and put in the “likely” category may throw a curve ball at the end of the process that prompts me to reclassify them as “unlikely.”

End your calls pleasantly. I always want a rejected client to hang up the phone feeling like they’ve been helped, or at least pointed in the right direction. It’s important to be gracious and helpful even as you dismiss them. There have been prospective clients who couldn’t afford me at the time but, years down the road, they called me back — a relationship was struck, and now I’m the first one they think of when they’re ready to do the work. Don’t discount the long-term investments; they may pay out when you really need the work.

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