



FACET RENOVATIONS

Appointment Checklist: Setting Strong Leads Together

We're in this as a team—your thoroughness here turns leads into wins for everyone. Gather this info to qualify, confirm, and make appointments stick. We appreciate your persistence; it's how we all thrive!

Customer Full Name

- ☐ Verify spelling and preferred name for personalized follow-up

Primary Phone Number

- ☐ Confirm it's accurate; note best time to call

Backup Contact

- ☐ Secondary phone or emergency number to ensure reachability

Email Address

- ☐ Get permission to send confirmations/reminders

Home Address

- ☐ Full address to confirm service area (Northern Illinois) and any access notes (e.g., gate code, parking)

Project Type/Needs

- ☐ Details like Wet space conversion or update, Full Remodel, Toilet, Vanities, Lighting, Flooring, New Bathroom Creation, or specific features (e.g., accessibility, modern vs. luxury style)

Qualification Basics

- ☐ Confirm they're the homeowner; ensure that they are a decision maker

Appointment Date/Time

- ☐ Preferred slot; double-check availability and note any flexibility. Will all decision makers be present at the appointment? Do they have any other companies coming to look at this time? If so, encourage them to schedule us first or last -- See BDC WordTrax Document

Preferred Communication/Consent

- ☐ How they want reminders (text, email, call); send initial confirmation right away. Also, request permission to send text messages (this consent will not be abused or transferred). Modify consent in LEAP appropriately

* Customer Recon/Report

- ☐ If the conversation flows naturally, inquire about their motivations for the project (e.g., "What inspired this remodel?") and any recent home improvements they've completed. This builds rapport and provides valuable insights for the sales team

Pertinent Notes

- ☐ Jot down pertinent notes like excitements (e.g., "Loves modern designs") or anything that could prove helpful for sales prep

Your attention here builds lasting relationships and boosts our shared success—thanks for caring as much as we do!

** Optional but encouraged step to enhance customer connection and sales readiness.*

A luxurious look. A cut above.