

Setting Up Practice Appointments



PHONE APPROACH:

“Hey ____, this is (name). How’s it going? (a little rapport). Great! Well do you have a quick second or did I catch you at a bad time? Cool. Well the reason I’m calling is I just started a new job here working for (company). I’m going to be helping out with taking care of homeowners in the area who were hit with that big hail storm a couple weeks ago.

Anyway, for the first couple weeks, one of my assignments is to practice doing some inspections and actually take a look at a handful of roofs so I can get used to knowing what to look for, measuring, and diagramming and so on. My goal is to look at 10 roofs by Saturday, and I was wondering if you’d be nice enough to let me stop by and do a practice run with you. Would (day) at (time) or (time) work better for you?”

FIRM UP:

“Cool, I really appreciate it! Can you do me a quick favor? Let me know when you have a pen.Terrific, can you go ahead and write down that I’ll be by on (day) at (time) on your calendar? Here’s my phone number in case something pops up, it’s ###-###-####. Got it? Cool! What’s your address again? Great, and is your house 1 or 2 stories? Okay cool. If it rains or something, I obviously can’t get on the roof, so I’ll call you if anything pops up. I’ll see you on (day) at (time)!”

Questions you might get:

Do I have to be there? – “Great question! Yes, you do have to be there but it’ll only take 25 minutes or so. Basically what I’m going to do is hop up on the roof, take a look at it, take some pictures, and that’s it. If I don’t see anything, you can just sign off that I did the inspection. If I do actually find any damage though, I’ll come down and show you what I found. So would (time) or (time) on (day) work better for you?”

Thanks, but I already had someone check it out! – “That’s no problem! Like I said, I’m just doing it for the practice, and I really need to look at 10 roofs by (date), and every roof I look at counts toward my goal, so if it’s okay, would you mind still letting me swing by on (day) to just do a run-through anyway?”

I don’t think I have any damage, I wouldn’t want you to waste your time. – “That’s totally fine, in fact it doesn’t matter if you have damage or not. I just need to get my 10 inspections in by (day) and it would really help me out if I could take a peek at yours! It’ll only take about 25 minutes, I’ll be in and out before you know it. Would (time) or (time) on (day) work better for you?”

I already signed a contract with somebody. – “Oh really? Cool! Who with? (some guy that came by and knocked on my door) – eeeeeek....someone that just came and knocked on your door? I’ve heard a couple horror stories about the fly by night companies that do that. Did they seem legitimate? Okay. Well like I said, I’m just doing it for the practice, and I really need to look at 10 roofs by (date), and every roof I look at counts toward my goal, so if it’s okay, would you mind still letting me swing by on (day) to just do a run-through anyway?”

No thanks, I’m just not interested. – “That’s totally cool, in fact that’s the best part about it, because I’m not selling anything. I’m just doing it for the practice, and I really need to look at 10 roofs by (date), and every roof I look at counts toward my goal, so would (time) or (time) on (day) work better for you?”

Tips for Scheduling Inspections



- Keep it simple and relaxed. Don't be salesy or over-the-top with enthusiasm.
- **Have appointment slots already blocked off** in your planner beforehand.
- To start off, **schedule inspections 1.5-2 hours apart**. As you get more fluid with the presentation and faster at diagramming and measuring, you can schedule them 60-90 minutes apart.
- **Stick to the script!** We use it because it works. Don't stray from the script or try to do your own thing – we promise we wouldn't give you something that didn't work.
- **ALWAYS offer TWO times** (give them choices instead of a yes or no question)
- Be sure to choose a time where **both the husband & wife can be there**. (*"Is there a Mr.?"*)
- Always confirm your appointments by **firming up**.
- **Never schedule an inspection more than 3 or 4 days in advance** (too easy for people to forget/stuff to pop up)
- **Don't do an inspection on the spot!** People who are good at their profession should be too busy to drop what they're doing at someone's beck and call. Scheduling an appointment also gives you a chance to make 2 impressions instead of 1. Additionally, asking for an immediate inspection is a "yes or no" question, which we don't want. Asking 2 times is a choice question.
- **Do NOT SELL on the phone/at the door** (i.e. don't say, *"Want to learn how we can get you a free roof?"* Sounds sketchy) – remember the ONLY reason you are talking to that person is to schedule an inspection, nothing more.
- **Consider time frames for various demographics**. For example, older/retired people are usually home during the day time, so later afternoon appointments might work, whereas a working mom and dad with kids are likely not to be available until early evening.
- **Take detailed notes** about any calls or knocks you've made so you know who you have spoken to, what they said, and what happened (for example if they were or weren't home, you spoke to them and did or didn't set up an inspection, etc.)

Notes: