



SALES GUIDE

Cover page

Page 2. Strategic Lead Development Process & job statuses

Page 3. New Prospect checklist

Page 4. Photo checklist

Page 5. How to ask for referrals

Page 6. Adjuster appointment checklist

Page 7. Contract signing checklist

Page 8. Prospect to Approved checklist

Page 9. Install checklist

Page 10. Overcoming objections cheat sheet

Page 11. D2D Script

Page 12. Transition lines to advance the sale

Strategic Lead Development Process

The success formula = 50 Doors - 10 Conversations - 1 Claim a day

To start:

1. Select recent storm map/date in HailTrace app
2. Scout desired neighborhood for 1 or more of the 5 signs of storm damage
 - a. Missing shingle on roof
 - b. Creased shingle on roof
 - c. Patch or repaired roof
 - d. Old roof / bruised roof
 - e. Large amounts of debris on roof & in yard
3. Pin storm damaged houses in HailTrace with the "Storm Damage" icon
(keep 100 contacts minimum at all times)
4. All interactions are to be logged in Acculynx under "Lead" status with a minimum of the following items:
 - a. First name (do not include Mr., Mrs., or punctuation)
 - b. Property address
 - c. Phone number (preferred)
 - d. Short note in profile describing how the conversation went
(do Not tag management)

Note: All "Did Not Answer" doors, "Not Interested" conversations & "Renters" are to be left in the HailTrace app and marked with the corresponding icon.

****The key to winning the day is filing 1 claim (minimum) a day & no less than 3 a week****

Important:

- **Lead** = No claim yet (Note: retail jobs stay in Lead status until contract is signed)
- **Prospect** = Claim has been filed with authorization form signed, profile has been updated & next steps have been tee'd up with insurance carrier
- Submitted for **Approval** = Contract has been signed, profile has been updated and ready for order fulfillment

New Prospect Checklist

Make sure you have these items BEFORE leaving the customer's house!

Items that should already be on file: Customer name, address, phone & email

Use this checklist once you land the inspection to close the deal

- ☐ Photos (ref. Max4 Photo Checklist on pg. 3) - cannot have too many
- ☐ Show customer Video Inspection on airplane mode while putting ladder away
- ☐ Prepare the customer for calling the claim together on speakerphone...
 - Adjuster appoint scheduled within the next 2-3 business days
 - Make sure the homeowner knows to give you appt time & date & that you will meet them there for the appointment for a thorough evaluation
 - If no response by day 4, you as the rep, will follow up with the carrier and make sure the adjuster contacts the homeowner to schedule the appt
- ☐ Have customer sign authorization form
- ☐ Get ins carrier's name, number, storm date (ref. HailTrace app) & call claim in
- ☐ After claim is called in, explain the following items:
 - Pricing (Xactimate) - use KellieBlueBook analogy
 - Payments - 1st Payment, Deductible, 2nd Payment
 - Accountability - no money saved, carrier is in control of the process, use body shop analogy to communicate the simplicity of the process
- ☐ Give folder and walk homeowner through it - have them think about their color
- ☐ Ask for referrals - Don't cut yourself short! (ref. pg 5 How to ask for referral sheet)
- ☐ Stake the yard sign
- ☐ Shake their hand
- ☐ Knock neighborhood using **SLAP Canvassing Formula** referencing your new customer and how you are helping them
 - Leave **Door Hanger Letter** at the door if they are not home
 - Mail the **Direct Mail Letter**
- ☐ Upload all new customer info into Acculynx profile BEFORE end of day
- ☐ Send video message next AM reiterating expectations to homeowner - Stay in control

THE MAX4 PHOTO LIST

EXTERIOR PHOTOS

FRONT SIDE OF HOUSE + ANY DAMAGE

RIGHT SIDE OF HOUSE + ANY DAMAGE

BACK SIDE OF HOUSE + ANY DAMAGE

LEFT SIDE OF HOUSE + ANY DAMAGE

DECK + FENCING + MAILBOX

ROOF PHOTOS

DRIP EDGE, OR NO DRIP EDGE

LAYERS OB ROOF, PITCH OF ROOF

FRONT SLOPE OVERVIEW, PHOTO HAIL/WIND

RIGHT SLOPE OVERVIEW, PHOTO HAIL/WIND

LEFT SLOPE OVERVIEW, PHOTO HAIL/WIND

ALL METALS + ACCESSORIES ON ROOF

*PERFORM BRITTLE TEST

INTERIOR PHOTOS

INDIVIDUAL ROOM OVERVIEW + CLOSE UPS

MEASURE WIDTH + DEPTH OF EACH ROOM +

CEILING HEIGHT OF EACH ROOM

How to Ask For Referrals

2 Primary Methods:

1. The direct approach
2. The in-direct approach

Here is the script...

1. Direct approach

Hey Mr. homeowner, I'm glad we were able to get everything going for you and on the right track. Real quick before I go, you and I both know that no one likes to give information to someone who feels like they are going to try to be sold something. That is not what I'm after and helping good people like yourself is how I provide for my family. Who do you know that might need their roof looked at in the same way I have been able to help you today? Friends, family, neighbors, co-workers?

2. In-direct approach

Hey Mr. homeowner, I'm glad we were able to get things going for you and on the right track. Before I let you go, during the demo process there is a lot of debris that comes off your roof. Now, we are going to ensure everything is thoroughly cleaned up and there is potential for trash to blow into your neighbor's yard. If that happens I want them mad at me, not you. Who are the neighbors I need to watch out for? Then ask, and who are the neighbors you really like?

Transition to the ask in either approach:

If it's a neighbor, Mr. homeowner, would you mind walking me over to the neighbors? You don't have to say a word. I just want to let them know I might help them the same way I have been able to help you. Fair enough?

If "no" or physically unable to walk to the address, ask them to put you in a group text with the neighbor and send a video introduction, call and schedule an inspection or swing by their house and repeat the process!

Be creative, smile, keep it lighthearted & make it fun!

Pro-tip: ask multiple times starting the day you file the claim and at the peak of every positive moment within the process. Example: filing the claim, adjuster approving roof, signing the contract, install day...

Adjuster Appointment Checklist

- ☐ Call the adjuster the day before the appointment & break the ice
- ☐ Be at the adjuster's appointment the day of, 15 minutes early
- ☐ Have your ladder setup for the adjuster to use if they choose
- ☐ Touch base the homeowner and give a brief run down and review of next steps
- ☐ Support the adjuster, be there to help and ensure everything gets a fair assessment
- ☐ Asked to be CC'd on the report
- ☐ After adjuster inspection, explain the following items:
 - ☐ Pricing (Xactimate) - use Kelly Blue Book analogy
 - ☐ Payments - 1st Payment, Deductible, 2nd Payment
 - ☐ Accountability - no money saved, carrier is in control of the process, use body shop analogy to communicate the simplicity of the process
- ☐ Ask for referrals - Don't cut yourself short! (ref. pg 4 How to ask for referral sheet)
- ☐ Make sure the homeowner knows you will follow up with the adjuster if no word by the 10th business day
- ☐ Put reminder in calendar to call adjuster on day 10 then give the homeowner an update
- ☐ Send video message reiterating expectations to homeowner - Stay in control

When the adjuster's report arrives, ref. page 6.

Contract Signing Checklist

- ☐ When the report arrives via mail or email, call homeowner and schedule a time to the report and coverage within 24hrs of the report arriving (or as soon as possible)
- ☐ Once scheduled, order Eagleview in the Acculynx profile

Make sure the following items are already in the customer's profile:

- ☐ All customer basic information
- ☐ Photo the way Max4 photo shows
- ☐ Signed authorization form
- ☐ Eagleview that has been ordered
- ☐ A copy of the adjuster's report
- ☐ Reference Prospect to Approved
- ☐ Call your manager and review report and prep customer agreement for signature
- ☐ Review report & sign the contract with homeowner
- ☐ Explain payment expectations & next steps
- ☐ Reference Prospect to Approved checklist once more on page 7 to ensure a smooth handoff to the office

Once the Prospect to Approved checklist is completed, congratulations!

It is rinse & repeat and onto helping your next customer!

PROSPECT → APPROVED → OFFICE

1. Be sure to fill out the contract entirely upon job submission

- Write “N/A” where needed on the contract - do not leave **any** blank spaces on the contract
- Make sure **ALL** trades are spelled out clearly
 - **Ex:** Full Gutter Replacement/White/5 inch

→ The above step is important as it is the “handoff” from you to the Office Staff. Prepare your customer for the Office Handoff. Let them know that they now will be communicating with the office and make sure they feel confident in that transition

2. Complete ALL job profiles within Acculynx with a valid:

- Email address
- Property address
- Name (spelled legibly and correctly)
- Cell phone number for direct client and spouse (no spouse, get work number)

→ The information you are gathering here and entering into Acculynx is vital to the Office Staff. They can not do their job well, or serve the client well, if this is not performed precisely

3. Tag “CSM-Taylor & Production-Sydney” in Acculynx with the following:

- Make sure to first submit customer profile from **PROSPECT** to **APPROVED**
- Create Job Message in Acculynx with the title: “Submit for Approval”
- Include the current status of the first check -
 - 1) Do they have it now = Yes or No?
 - 2) Is there a mortgage on the house = Yes or No?
 - 3) Who is the mortgage with = full company name
 - We **MUST** know the mortgage company, **no exceptions**. Jobs will not be approved and added to sales volume without it.

4. Supplement Request

- Include any SUPP information in the above submission for approval - if needed
 - CSM-Taylor will tag MAX4 to review for a SUPP REQUEST **Sales Rep **only** initiates a SUPP REQUEST when it's a partial or denial, and you're pushing for a full replacement, prior to a signed contract.
 - When MAX4 is reviewing an approved estimate for SUPP reasons, they may ask the sales rep to gather additional info such as a brittle test.

4. Acculynx: Job Flow / Customer / Communication / Documentation

- Communication about a job **MUST** remain in Acculynx
 - NO calls, texts, or emails
- **ALL** documents, details, photos, messages, notes, etc - are to live within the clients AccuLynx profile to make it easily accessible to all team member

Install Checklist

- ☐ Arrive at install at 9am
- ☐ Go into email & complete the digital install checklist
- ☐ Connect with your homeowner & let them know you will come by the next morning to ensure everything is cleaned up and good to go
- ☐ Ask for a referral! (ref. Page 4)
- ☐ Swing by the next morning (add to your calendar so you do not forget) & make sure everything is cleaned up and looking good!
- ☐ Let the homeowner know the office will submit all documentation for any remaining balance
- ☐ Ask for a referral! Don't miss out! You helped you homeowner get a quality product, gave them a premium customer service experience, and helped them save thousands of dollars in the process!

Objection Library Cheat Sheet

STEP #1: Ask yourself, "What does this question or objection really mean?"

STEP #2: Which category does it fit? Trust - Need - Money

STEP #3: Respond using the "ARO" Formula (**A**cknowledge, **R**eassure, **O**vercome)

Common Objections by Category

<u>Trust</u>	<u>Need</u>	<u>Money</u>
Problem: <i>They don't <u>trust</u> me yet.</i> Solution: Build more rapport and trust!	Problem: <i>They think they don't <u>need</u> my services yet.</i> Solution: First find out - can I help? Diagnose. Prescribe.	Problem: <i>They're concerned about <u>money</u> and cost.</i> Solution: Show how the value you bring far exceeds the cost.
"I have to talk to my husband/wife." "We have to think about it." "I don't want to show you the insurance paperwork/estimate." "Leave your business card and we'll call you if we're interested." "I want to see what my insurance company says first." "I don't want you talking to my insurance company." "I'll work with the insurance myself." "You're the XXth roofer here." "I have a friend who is a roofer." "I want to work with someone local." "I don't want to sign anything yet."	"I want to let my insurance company handle it." "My roof is fine." "We don't have any problems." "We already had the insurance company out." "We're good." "We're not interested." "I don't want to file another claim." "We want to wait to do the roof." "I want to see what my insurance company says first." "I already had a roofer look at it."	"Give me an estimate." "The other company said they'd eat my deductible." "Your price is too high." "The other company will do it for less." "I want you to also include XYZ for free." "I just want to keep the insurance money and not do the work." "I don't want my insurance rates to go up."

<u>“S.L.A.P”</u>	<u>What It Means</u>	<u>Sample</u>
S	Say hi and break the ice	<i>“Hey, I’m Adam. Beautiful boat in the driveway by the way...”</i>
L	Let them know why you’re here. Make it familiar to their neighborhood, neighbors street, or subdivision.	<i>“I just left your neighbor Peggy’s house after helping her _____. The reason I’m here is to...”</i>
A	Ask an open ended question (that requires them to think about an answer. NOT a “yes” or “no”	<i>“While I’m in the neighborhood I wanted to stop by ask... When was the last time your roof was inspected and had routine maintenance?”</i>
P	Present your pitch in response to their answer.	<i>“I understand. Glad I stopped by because I can help”</i>

Transition Lines to Advance the Sale

- Can you see any reason why you wouldn't want to move forward?
- Does that make sense?
- Is that fair?
- Fair enough?

Use these closing lines after explaining the next step in the process or after handling an objection to organically move the deal forward with positive energy and a happy customer!