② Qualifying Questions

Qualifying Questions are essential to help a tradesperson figure out if a job is worth pursuing before investing time in site visits or quoting. The goal is to determine whether the lead is serious, suitable and profitable.

Topic	Question	Why it matters
Work Type	Can you give me a quick overview of the work you are wanting completed?	Ensures the job fits within your scope and expertise.
Timeframe	What is your timeline for getting the work completed?	Filters out Customers who need urgent work you may not be able to accommodate – or aren't ready to start for some time.
Decision Maker	Are you the main person making the decision for this project?	Confirms you are speaking with the decision maker or if someone else is involved
Expectations	Have you done similar work before or is this your first experience with a project like this?	Gives insight into the Customers expectations and possible red flags (if they have had bade experiences)
Budget	Just to make sure I can tailor the quotation and proposal appropriately – do you have a budget range in mind?	Helps understand if the client is realistic or way off on their expectations. Prevents quoting for jobs where the budget does not match the required scope

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② Qualifying Questions (continued)

Topic	Question	Why it matters
Finance (applicable for specific jobs)	Have you considered utilising finance for the job?	Finance can be an option that makes specific jobs an easy decision (i.e. heat pumps and solar) for the client and guarantees you full payment on time.
Tradesperson Qualities	When selecting your tradesperson, what do you value most – speed, price, quality or something else?	Helps to tailor your approach and pitch. Some people care most about price, others about timelines, quality, or communication.
Competition	Do you mind me asking – are you gathering a number of quotations or are you ready to move forward if I can satisfactorily answer all of your queries and you feel I am a good fit?	Gives you insight into how competitive the job is and the urgency of the client.
Site	Will I be able to access the site easily if a site visit is required?	Helps you plan for quoting , especially if access is restricted (e.g. tenanted properties, commercial buildings etc)
Response	I will provide a full quotation for your approval, would it be ok if I contact you with this within the next 24-48 hours?	Confirms client interest and urgency and gives you permission to make contact again.

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Tips: Be on-time, be prepared with questions, be organised, be professional, be interested and present.



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