6 Conversion to a Confirmation

Converting a client from a quote or proposal to confirmed job is the final – and most important – step in the sales process. It requires clear communication, confidence and responsiveness. Many tradespeople lose work not because of price or quality, but because they don't guide customers across the finish line.

- Follow Up Promptly
  - Wait 2-4 days after sending the quote, then follow up
  - When presenting the quote/proposal seek the customers permission to follow up – then they will be expecting your call
  - Ask if they've had a chance to review it and if they have any questions

- Ask for the Job
  - Don't just check in – politely ask if they're ready to proceed
    - Say "Would you like me to lock this in for you" – "Are you happy for us to go ahead and get started"

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⑥ Conversion to a Confirmation (continued)

- Handle any Objections or Hesitations
  - Be ready and prepared to answer questions about price, timing or inclusions
  - Reclarify Scope, resolve any confusion and re affirm value
    - Ask "is there any reason you are unable to proceed with our proposal"

- Give a Clear Next Step
  - Don't leave it vague – tell them how to confirm
  - Request their confirmation at the time or say
    - "Once your happy to go ahead, just reply to this email or sign the acceptance form and I'll get things booked in and underway"

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⑥ Conversion to a Confirmation (continued)

- Offer a Booking Incentive
  - If they are sitting on the fence give them a reason to act now
  - Don't discount price but use ideas like
    - "I've got a spot next Wednesday we can hold for you if you can confirm by end of tomorrow"
    - "Prices are holding at the current rate until the end of the month"

- Make it Easy to Accept
  - Provide a simple acceptance step
    - Tick and sign form
    - Online acceptance link
    - "Reply "YES" to confirm" in the email

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⑥ Conversion to a Confirmation (continued)

- Send a Clear Confirmation Message
  - Once they say yes, respond quickly with a written confirmation including:
    - Start Date
    - Payment Schedule
    - Next Steps

      - Say " Thanks for your confirmation. We have booked in your job for July 24th. I'll be in touch the day before with further details.

- Remove Uncertainty
  - Remind the customer they are in good hands
  - Reassure them of the plan, communication and quality

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⑥ Conversion to a Confirmation (continued)

- Keep the Momentum
  - Don't delay after they say Yes
  - If there is a gap before work starts, keep in touch (a quick email leading up to the start)

- Document Everything
  - Send a clear, professional agreement or acceptance
  - Save a signed copy, or written confirmation for your records
  - Clarity avoids disputes and keeps both parties clear

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