# THE POWER OF A STRONG SALES PROCESS

Helping Tradespeople Win More Work, More Often

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# Why Sales Skills Matter in the Trades

- Being great on the tools isn't always enough
- Competition is fierce – Customers have more choice than ever
- Customers want professionalism from the first phone call through to the final invoice
- Being the same as your competitor guarantees you nothing

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# Understanding the Sales Process

- A **step-by-step approach** to handling enquiries, quoting and winning jobs
- It includes:




- It's not about being a "salesperson" - it's about clear, confident communication

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# What a Good Sales Process Delivers

- Higher conversion rate from quotes
- Less time wasted on tyre-kickers
- More consistent pricing and quoting
- Professionalism building trust and referrals
- Improved margins with less discounting
- Win more jobs

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# People buy off People

- Customers often can't judge the technical side of the job

- But they will notice
  - How fast you reply
  - Whether your quotes are clear
  - How professional you sound, look and present yourself
  - Whether you follow up.

- A great sales process builds trust, removes doubt. And makes it easy to say "yes".

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# Real Life Examples – Quote One

Second response also paints a picture of the type of business you are potentially going to be dealing with.

Note there has been no follow up

First note time taken to reply from Dave's first enquiry
Level of response is totally lacking and unprofessional – why would you give this guy your business.

Note spelling mistakes

Due to lack of initial response the customer is already starting to ask questions about the level of commitment and professionalism this company offers

**From:**
**Sent:** Thursday, 3 July 2025 5:23 pm
**To:** Dave Wilson <dave.wilson@mastercraft.co.nz>
**Subject:** Re: Concrete grind and polish

Hi , yes they come up very good .
Cheers

On Thu, 3 Jul 2025 at 5:21 PM, Dave Wilson <dave.wilson@mastercraft.co.nz> wrote:

Thanks Bryan

I was beginning to wonder if you had not received my email.

Great that you must be busy in this tough market.

Do old concrete floors come up nicely with this treatment?

Cheers

**Dave Wilson** National Operations Manager

**From:**

**Sent:** Thursday, 3 July 2025 4:55 pm
**To:** Dave Wilson <dave.wilson@mastercraft.co.nz>
**Subject:** Re: Concrete grind and polish

Hi Dave , thanks for inquiry .Cost world be $2800 plus gst

cheers Bryan

On Wed, Jun 11, 2025 at 11:17 AM Dave Wilson <dave.wilson@mastercraft.co.nz> wrote:

Hi there

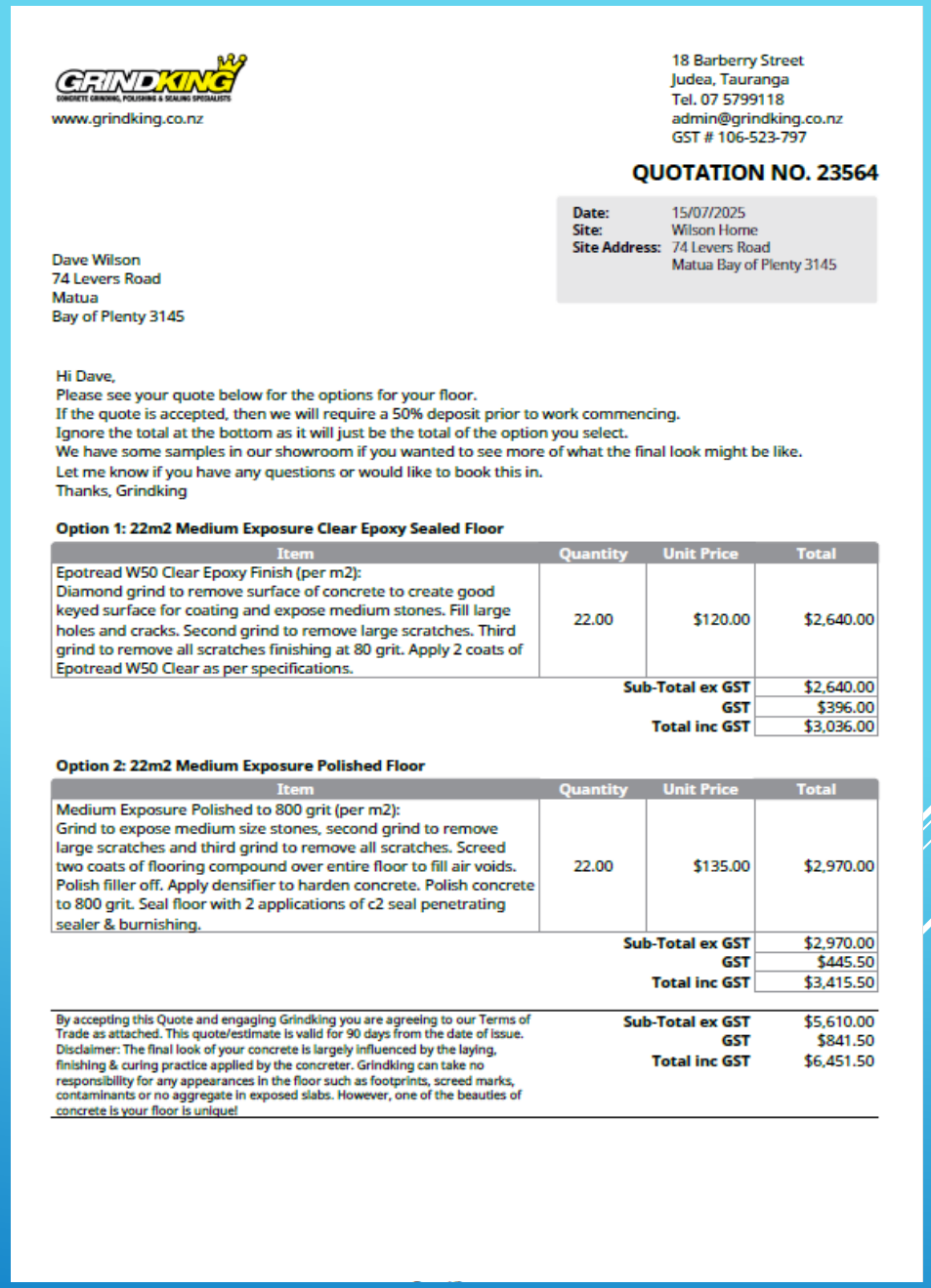
I have a small, 22m2 concrete garage floor that is now my home office, so looking at potentially grinding and polishing the floor.

Could I please have an estimate for a floor this size in Matua?

Cheers

# Real Life Examples – Quote Two

- Company visited site
- Discussed options
- Provided detailed proposal with options
- Responded within a timely manner
- Included Terms of Trade etc within the proposal
- Advised payment terms



GRINDKING
CONCRETE GRINDING, POLISHING & SEALING SPECIALISTS
www.grindking.co.nz

18 Barberry Street
Judea, Tauranga
Tel. 07 5799118
admin@grindking.co.nz
GST # 106-523-797

**QUOTATION NO. 23564**

**Date:** 15/07/2025
**Site:** Wilson Home
**Site Address:** 74 Levers Road
Matua Bay of Plenty 3145

Dave Wilson
74 Levers Road
Matua
Bay of Plenty 3145

Hi Dave,
Please see your quote below for the options for your floor.
If the quote is accepted, then we will require a 50% deposit prior to work commencing.
Ignore the total at the bottom as it will just be the total of the option you select.
We have some samples in our showroom if you wanted to see more of what the final look might be like.
Let me know if you have any questions or would like to book this in.
Thanks, Grindking

**Option 1: 22m2 Medium Exposure Clear Epoxy Sealed Floor**

| Item | Quantity | Unit Price | Total |
|---|---|---|---|
| Epotread W50 Clear Epoxy Finish (per m2): Diamond grind to remove surface of concrete to create good keyed surface for coating and expose medium stones. Fill large holes and cracks. Second grind to remove large scratches. Third grind to remove all scratches finishing at 80 grit. Apply 2 coats of Epotread W50 Clear as per specifications. | 22.00 | $120.00 | $2,640.00 |
| | | **Sub-Total ex GST** | $2,640.00 |
| | | **GST** | $396.00 |
| | | **Total inc GST** | $3,036.00 |

**Option 2: 22m2 Medium Exposure Polished Floor**

| Item | Quantity | Unit Price | Total |
|---|---|---|---|
| Medium Exposure Polished to 800 grit (per m2): Grind to expose medium size stones, second grind to remove large scratches and third grind to remove all scratches. Screed two coats of flooring compound over entire floor to fill air voids. Polish filler off. Apply densifier to harden concrete. Polish concrete to 800 grit. Seal floor with 2 applications of c2 seal penetrating sealer & burnishing. | 22.00 | $135.00 | $2,970.00 |
| | | **Sub-Total ex GST** | $2,970.00 |
| | | **GST** | $445.50 |
| | | **Total inc GST** | $3,415.50 |

By accepting this Quote and engaging Grindking you are agreeing to our Terms of Trade as attached. This quote/estimate is valid for 90 days from the date of issue. Disclaimer: The final look of your concrete is largely influenced by the laying, finishing & curing practice applied by the concreter. Grindking can take no responsibility for any appearances in the floor such as footprints, screed marks, contaminants or no aggregate in exposed slabs. However, one of the beauties of concrete is your floor is unique!

| | |
|---|---|
| **Sub-Total ex GST** | $5,610.00 |
| **GST** | $841.50 |
| **Total inc GST** | $6,451.50 |

# Two Quotes/Proposals

- Prices are very similar
- Who would you have most confidence in spending your money with?

# Quick Wins to Boost Your Sales Process

- Answer enquiries promptly – within hours, not days
- Pre-qualify leads – ask key questions to avoid timewasters
- Quote fast and follow up - most jobs go to the fastest quality quote
- Use templates or software – consistency builds professionalism
- Ask for the job – don't be afraid to close the sale
- Follow Up –a simple check-in wins jobs others forget

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# Long Term Impacts

- More work = more revenue
- Better jobs = less stress
- Happier Customers = more referrals
- Structured Sales = easier to train staff or grow a team
- You're building a business, not just doing a job

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# Where to Go from Here

- Audit your current process - Where are the gaps?
- Start simple – even small changes make a big difference.
- Consider training or tools to streamline quoting & follow-up.
- Talk to others in your trade who are doing well.
- Be prepared to change to be better and different than everyone else.

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# Don’t Just Be the Best on the Tools - Be the Best at Winning Work

*“You can be the best in your trade,*
*but if no one knows it –*
*it won’t grow your business”*

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# ① First Impressions

First impressions are a make or break in the trades. Customers often decide within seconds whether they trust you, and that impression can influence whether they hire you, recommend you, or ever call you again.

- Professional Appearance
  - Branded, clean uniform or workwear
  - Tidy grooming

- Clean, Well-organised Vehicles
  - Branded signage helps build trust
  - Tools and materials stored neatly – don't demonstrate chaos
  - Quality of your vehicle presentation demonstrates pride in the work you do

- On Time
  - Arrive when you say you will - gives you instant credibility
  - Communicate if running late – shows you respect the Customers time

- Friendly, Confident Introduction
  - Greet your customer with a smile and handshake (if appropriate)
  - Introduce yourself clearly
    - "Hi, I'm Dave from Mastercraft Electrical. Thank you for the opportunity to meet."

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# ① First Impressions (continued)

- Good Communication Skills
  - Speak clearly, explain things in a simple manner
  - Listen carefully without interrupting
  - Don't use industry jargon or overcomplicate

- Be Prepared
  - Have notepad, phone and necessary tools
  - Know what the visit is for
  - Demonstrate you value the customers time

- Be Respectful of Property
  - Wipe feet or remove footwear if needed
  - Don't slam doors, gates etc
  - Don't leave rubbish or mess

- Ask Smart Questions
  - Show interest in the customers needs
  - Suggest improved solutions if relevant
  - Don't just say "yep, no worries" to everything

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# ① First Impressions (continued)

- Don't Trash the Competition
  - Keep the conversation professional
  - Focus on building customer confidence in you and your brand by not bad mouthing competitors
  - Negative talk can make you look weak and insecure

- Communicate Next Steps
  - Advise your customer what will happen next
  - Thank them for their time
  - Follow up as agreed – "Thanks for your time, I will get the quotation and information through to you by this Wednesday"

Tip: Be professional & efficient in all your communication. Ensure your email signature, quotations and website are professional and accurate in terms of layout, spelling, contact details etc.

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# 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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# ③ Site Visits/Consultation

Site visits are a critical part of the sales and planning process for tradespeople. They go far beyond just "checking things out" – they lay the foundation for accurate quoting, client trust, and job success.

On site Meetings

- Be on time
- Be planned & organised with all relevant information on hand
- Be dressed professionally
- Build rapport, establish trust and confidence with the customer
- Engage in conversation easily , lead the conversation where possible to qualify the client and fully understand the project
- Be honest, be real – don't be scared to ask questions, highlight challenges and provide confidence around potential solutions
- Demonstrate interest and take notes of key details
- Confirm next steps including timeline for response
- Follow up with email same day
- Respond within agreed timelines

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# ④ Quotes and Proposals

A professional quotation or sales proposal is one of the most powerful tools a tradesperson can use to win work, build trust and standout from the competition. It's not just about the price – its about showing the customer you are organised, transparent and serious about quality

- Present all information professionally through the use of templates or forms
  - Never send one line emails – demonstrates lack of engagement and looks unprofessional

- Ensure Clear Branding and Contact Info – shows professionalism and builds trust
  - Business name & Logo
  - Address, Phone, Email and Website
  - Licence numbers (if applicable)

- Include Client Details
  - Customer name, address & contact info
  - Site address if different from postal address – makes it personal and accurate

- Include Date and Quote Reference Number
  - provides reference for both parties

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# ④ Quotes and Proposals (continued)

- Detail Complete Scope of Works
  - Provide a detailed breakdown of what is included
  - Clearly mention site preparation, materials, labour, clean up, etc
  - Do not generalise terms like "general work"
  - Detail any exclusions clearly

- Provide a Clear Pricing Structure
  - Itemised pricing (Labour, materials, equipment hire, etc)
  - Provide Subtotals and Total amount incl. and excl. GST
  - Optional items or add-ons need to be clearly identified and shown separately
  - Transparency in pricing prevents disputes and builds credibility

- Exclusions and Assumptions
  - Clearly list anything not included
  - State any assumptions (e.g. power is available on site)
  - Clarity avoids scope creep and misunderstandings later

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# ④ Quotes and Proposals (continued)

- Detail Proposed Timeline and Availability
  - Provide an estimated start date or availability
  - Provide an estimated duration of the work
  - Customers want to know when you can start and how long the job will take.

- Clearly Outline Payment Terms
  - Fully detail any deposit requirements (a good option in current markets)
  - Detail Progress Payments (if applicable)
  - Detail Final Payment terms
  - Ensuring you have full agreement on payment terms assist you with cash flow

- Terms and Conditions
  - Detail all Warranty info
  - Clearly identify the validity of the quote and its expiry date
  - Detail any cancellation or variation terms
  - Ensure your quotation terms are both fair and professional

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# ④ Quotes and Proposals (continued)

- Ensure Proposals and Quotations are Friendly & Professional
  - Personalise the proposal with a short message
    - "Many thanks for the opportunity to present our proposal for your electrical upgrade…"
  - Invite the customer to ask questions if they are unsure of anything or unclear on the details
  - Include your name and direct contact details
  - Be approachable and accessible

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# ⑤ Follow Up

Following up on a quotation or sales proposal is one of the most effective and overlooked steps in the sales process – especially in the trades. Many good quotes go cold simply because no one followed up.

- Increases Your Conversion Rates
  - Many customers wont act until you give them a nudge
  - A simple follow- up often turns a “maybe” into a “yes”
- Demonstrates  Professionalism and Reliability
  - Following up shows your organised, committed and serious
  - Reinforces the impression that you’ll be just as reliable during the job
- Keep Yourself and Your Business Top of Mind
  - People get distracted – even when they do want to proceed
  - A polite follow-up call, email or text brings you back in focus

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# ⑤ Follow Up (continued)

- Helps You Understand the Customers Thinking
  - You may discover they're just waiting on permits, finance or comparing scope etc
  - You get a chance to uncover and handle any objections (price, timing confusion)

- Gives You Valuable Feedback
  - Even if you don't win the job you can learn why – was it timing, price, scope?
  - Helps you improve future quotes and proposals

- Reduces Ghosting and Uncertainty
  - Instead of sitting around wondering if the job is going ahead, you get clarity
  - You can move on, book other work, or adjust the quote if needed

- Gives You a Competitive Edge
  - Most tradies don't follow up – so doing it makes you stand out

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# ⑤ Follow Up (continued)

- Encourages Referrals and Trust
  - People refer businesses that are easy to deal with
  - A follow-up can leave a lasting impression, even if the client doesn't proceed with you this time

- It's Quick and Easy
  - A short phone call, email or text takes minutes
  - You've already done the hard yards (the site visit and quote/proposal) – why wouldn't you follow it up and ensure you have every opportunity of the easiest win.

*Just because the industry currently operates in a particular way doesn't mean you don't have the opportunity to be different, stand out and be more successful.*

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# 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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# ⑦ After Sales & Referrals

Great follow-through after the job is done is what turns a one time customer into a repeat client and referral source. In the trades, your reputation is everything – and the after-sales stage is where long-term loyalty is built.

- Confirm Job Completion
  - Ensure the client is satisfied before leaving the site
  - Walk them through the work (if applicable)
  - Ask if they have any questions or concerns

  - A clear handover shows you care about quality and client experience

- Send a Final Invoice Promptly
  - Make it clear and easy to pay
  - Include a thank- you note with the invoice

    - "Thanks again for choosing us – we really appreciate your business"

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# ⑦ After Sales & Referrals (continued)

- Send a Thank-You Message
  - Within 24 -48 hours of completing the job
  - Can be a quick email, text or handwritten card
  - Leave something memorable with your details/brand

- Provide Warranty or Care Information (if relevant)
  - Email or print basic warrant/product details
  - Give care instructions or maintenance tips

  - The above adds value and shows professionalism

- Request a Review or Testimonial
  - Ask the customer to leave a Google/Facebook review or provide a short testimonial

    - Say " Would you mind leaving us a quick review online? It really helps businesses like our and it would be very much appreciated"

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# ⑦ After Sales & Referrals (continued)

- Ask for a Referral
  - If they are happy with your work, ask if they know anyone who may need your services

- Take & Share Job Photos (with permission)
  - Use before/after photos for social media or your business portfolio
  - Utilise these images for future business

- Schedule a Follow-Up (if applicable)
  - For ongoing maintenance requirements, set a reminder to check in at the appropriate time

- Record Client Details for Future Use
  - Save client information and specific job details etc within a CRM system

- Add your Customer to Your Mailing Lists to keep them informed
  - Send out occasional emails, seasonal tips etc to maintain contact

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# Handling Objections

Handling objections well is a core sales skill – especially in the trades , where Customers often have concerns about price, timing, or trust. The key isn't to argue or push harder, but to listen, understand and guide the client toward a solution.

- Stay Calm and Open-Minded
  - Don't get defensive or take things personally
  - Objections are a sign of interest, not rejection
  - Treat objections as a chance to clarify and help, not to "win"

- Listen Without Interrupting
  - Let your customer fully explain their concern
  - Show genuine interest in what they're saying
  - People want to feel heard before they're ready to listen

- Acknowledge the Concern
  - Say " I completely understand – that's a fair question"
  - A lot of customers ask the same thing at this stage"

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# Handling Objections (Continued)

- Ask Clarifying Questions
  - Dig deeper to fully understand the *real reason* behind the objection
    - Say "is it just the price, or is it something specific in the quote?"
      "What's your main concern – budget, timing, or something else?"

- Reframe the Value
  - Focus on outcomes, benefits, and peace of mind – not just cost or features
    - Say " We use high quality materials and products that reduce the risk of callbacks and last longer – that's part of the prices, but it saves you in the long run."

- Offer Options (If Appropriate)
  - Suggest flexible timing, staging the job or removing non-essential extras

  - Stay Confident and Professional
  - Confidence reassures the customer they're making the right decision

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# Handling Objections (Continued)

- Stay Confident and Professional
  - Confidence reassures the customer they're making the right decision
  - Avoid lowering the price overall but discuss options for adjustment if possible

- Ask for Feedback
  - Even if they don't go ahead , ask what influenced their decision
  - Feedback helps you identify where you need to improve

- Follow Up Again Later
  - If the customer advises they are not ready now, set a reminder to call them back
  - Once again ask for their permission so it is not a surprise when you call.

- Stay Helpful, Not Pushy
  - Your tone should always be relaxed, professional and confident
  - Your goal is to help them make a good decision, not force a sale

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