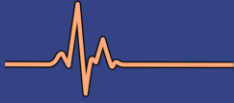


## Baseline Assessment



<b>Score 4</b>	This is a critical point of our sales process that needs to be developed
<b>Score 3</b>	Developing this topic would have a big impact on my business
<b>Score 2</b>	Improving this area would add some value
<b>Score 1</b>	This topic either doesn't pertain to me or needs no further improvement

First Contact: "How does my customer reach me?"	Score 1-4
1. Webform	
2. Local phone number	
3. "800" number or equivalent	
4. Social platforms	
5. Live chat	
6. Chat bot	
7. Online booking services	
8. Outside business hours (nights/weekends/holidays)	
9. Contingency plan for outages	
<b>For call-in customers</b>	
10. How many rings are acceptable?	
11. How are missed calls handled?	
12. Do you use phone scripts?	
13. What information do you collect every time?	
14. Customer hold times and reasons established	
15. Are there multiple line transfers to other departments?	
<b>Dispatch</b>	
16. Lead time from first contact to first visit	
17. Customer prepared for the visit (told exactly what to expect?)	
18. Must an adult be present?	
19. Will all decision-makers be present?	
20. Do you have a pet policy?	
21. Are payment expectations set?	
22. Are they prepared for the next contact? (reminder call, text, etc.)	

23. How is the technician prepared?	
24. Do you have a "warm handoff"?	
25. How are your arrival times handled? (exact, window, etc.?)	
26. Is your capacity optimized?	
27. How are priorities and emergencies handled?	
28. How do you plan for the unplanned?	
29. Is the right technician dispatched to the right job?	
30. Do you have an appointment reminder system?	
<b>The Appointment Arrival</b>	
31. Do you alert the status of your arrival?	
32. Where do you park?	
33. How are you recognized? Uniforms? Vehicle wraps/lettering?	
34. Do you knock? Use the doorbell? Text?	
35. Do you have a standard greeting?	
36. Does the customer restate the concern(s) for clarification?	
<b>Diagnosis</b>	
37. Time limit to diagnosis?	
38. What information is required to be collected or surveyed?	
39. How are findings and potential solutions initially presented?	
<b>Solutions Offered</b>	
40. Number of estimates or solutions offered	
41. How are these estimates or proposals presented and recorded?	
42. Do you have guardrails for discounts offered?	
43. What happens when the customer accepts?	
44. What happens when the customer needs time to think about it?	
45. What happens when the customer rejects?	
46. What forms of payment are offered, accepted, and expected?	
47. Do you collect at each visit or roll into projects?	
48. How do you wrap up the call? (forms required, debriefing, etc.)	
49. What is your turnaround time for the next phase?	
50. How is the next phase scheduled?	
51. Do you have 'leave-behinds' or branded messaging?	



Follow Up on Unsold Items	
52. Do you have a <b>clearly defined</b> follow-up process?	
53. Who quarterback each follow-up?	
54. How long between contacts?	
55. How many follow-ups?	
56. How are follow-ups tracked and recorded?	
57. When are leads considered 'cold'?	
Wrap Up	
58. Post completion courtesy call after completion? During?	
59. How do you catch questions and concerns before they are problems?	
60. Who has authority to solve problems?	
61. Do you have a defined escalation process?	
62. How do you handle your back-end paperwork, rebates, permits, etc.?	
63. Do you have a customer portal for payments and records?	
64. Do you have a maintenance or membership program?	
65. Do you have a 'customer for life' plan defined for future business?	
66. Do you have a customer newsletter?	
67. Do you offer system monitoring services?	
68. How do you ask for reviews?	

Great! Now, go back over this assessment and circle all the rows with "4" marked in the right column. If you are working on this project alone, the number of rows that you have marked with the number 4 should be more than enough to focus on. If you are working with a team or have extra capacity, look at all rows marked with a number "3" and decide if developing those prompts further will add value.

Do NOT tackle too much at once! Focus only on a few items at a time. I suggest 5 items or less. If you need to, give all of your 4's a priority number so you can clearly see which of your high-value items are the highest priority.