

# Example Quoting Process - Service/Maintenance Job



*The example below would be useful for a plumber/electrician who has been called to fix a typical small residential/commercial problem.*

## 1. Initial Enquiry (phone or email)

- Be friendly & smile
- Build rapport from the beginning

## 2. Initial qualification

- Gather enough information about the client/job scope to determine whether a face-to-face meeting/site visit is required to inspect (or refer onto another company if not suitable for your business).
- Use *a new client information sheet to record details*
- **If NO site visit is required**, establish details of the problem. Consider urgency/impact, timing for customer, budget. **Go to Step 6.**
- If site visit IS required go to step 3.

## 3. Book meeting/site visit

- Clarify the meeting purpose
- Date, time, duration
- Ensure all decision makes to be present
- Follow up email/SMS with meeting details. Include web links to project photos and client testimonials.

## 4. Confirm meeting

- Email or SMS – 24 hours/30 minutes before

## 5. Face to face meeting

- Dress/present professionally (if in work clothes – check appearance/cleanliness)
- Take information/credibility pack/business cards
- Questionnaire/tablet – if detailed notes are required
- Introduce yourself – first impressions are important
- Scope out the problem
- Ask about needs/wants, doubts/concerns
- Confirm project scope/details with client
- Explain the next steps (and if there is a cost to the client for this)

## 6. Present the solution

- Deliver solution/options in a clear way - address any needs/wants or concerns.
- Discuss pricing.
- Be confident and invite questions.
- Ask for the business/seek agreement to go ahead with job

## 7. Approval to go ahead

- Explain the next steps and payment terms/deposit
- Request written approval/agreement – if necessary
- Book the job into schedule with all the details

## 8. Follow through

- Thank the client and confirm the next steps
- Confirm job details with email/SMS
- Update all notes