



**CAPRICORN**

*...it's just easier!™*

Other resources in step 3b:

- Sample – Quote Book

## Don't wait for the customer to call – you call first

All the great sales people have a system that they follow, whether they are selling cars, real estate, parts or widgets.

The sales quote is no more than a step in that sales process, and those who believe that giving the quote on a job is the final step in the sales process have really got it all wrong. This belief is all too prevalent in the auto repair industry.

Many workshop managers or owners think that once they have given a quote on a job, all they need to do is wait around for the prospect to come back to them. If they do come back, it usually means that yours is the cheapest quote or bringing the car to your workshop is just convenient for them. But what if you never see them again?

Deals are not closed with the sending out of the sales quotes and then waiting for something to happen.

Sales are made by making things happen, and you are the only person who can make it happen. The workshop's role in the deal is to initiate the all-essential follow-up.

A workshop or solo technician can deliver quotes, both informal and formal, in a number of ways.

Examples include:

1. A service may have been completed and other items needing repair were noted. For whatever reason, the customer decides not to have these things repaired at the same time. But the required repairs should be noted on the current invoice, and explained to the customer when they pick up their car.
2. A diagnostic inspection may have been done, and a formal quote for the repair given to the customer.

3. An email or phone inquiry comes in, asking for a price for a specific service, which you happily provide.

In each of these situations the customer is faced with the fact that at some point in time, the work is going to need to be carried out.

These are what you would call hot prospects.

If you win all the quotes you hand out and can't keep up with demand, you don't need to do anything.

But if, like most workshops, a few more jobs would be great to keep everyone busy, following up on quotes could more than likely increase the chances of winning that extra business.

There is a fair chance that you will be competing against another business or more and it's often not the sales quote itself that's the deciding factor, but how it is followed up.

You might be thinking 'great in theory but how do you make it happen in a busy workshop'?  
It's simple – use a quote book.

Because quotes can take many different forms, often delivered by different staff members, a quote book is a necessity so that all quotes can be documented and centralised.

Your Point of Sale program might have this function built into it.

Refer to our sample quote book which contains information like:

- Name
- Date
- Contact number
- Quote details
- Price
- Quote number
- Follow up date
- Outcome

When even quote is given to a customer, no matter how it is delivered, in writing or on the phone, a summary of the quote goes straight away into the quote book.

The important column is the Follow up date, which could be as soon as within the next 48 hours. Others might be followed up weeks or even months later. While discretion might be required, a smart operator will sense how quick, or how delayed the follow up should be. Someone in the business must be given the task of following up the quotes.

The simplest follow up line is to call the person and ask if they have any questions about the quote.

You will soon discover whether the quote is still being considered. Sometimes, there may be an opportunity to re-quote. Equally important for your business intelligence, is to be able to find out why you didn't win the order, or to unearth future opportunities.

However, you may get the answer you're hoping for, that they would like to make a booking.

Don't expect to win every job you follow up. You only have to win one job that you would have otherwise lost to make the quote follow up routine worthwhile.

The other great advantage of the quote book is that it allows you to review your quotes and see if there are any trends in the jobs you are missing.

For example, if you see that you are repeatedly missing one type of enquiry then you could review your sales pitch or pricing.

As businesses grow, more people within the business will be communicating with customers. A challenge for growing businesses is being able to maintain consistency in the delegation of tasks.

There's no better way to lose a job or unnerve a customer than a staff member giving a price on a job, and the customer being told something different next time they come in.

The quote book solves all that as well.

So here's the challenge. In the next four weeks, give yourself a target to implement a quote book so you can properly complete your sales process and follow up all your outstanding quotes.

The place to start is [www.tatbiz.net.au/capricorn](http://www.tatbiz.net.au/capricorn).

*Just go for it!*