



CONTRACTOR / PRINTABLE FIELD GUIDE

2026 Sales Consultation Playbook

A repeatable, homeowner-friendly consultation from first call through written follow-up.

1. Prepare

Review project type, property, timeline and decision-makers. Bring a clear process, relevant work examples and a way to capture photos with permission.

2. Discover

Ask what prompted the project, what outcome matters, what has already been tried, constraints, desired timing and how the customer will decide. Listen and restate the scope before proposing.

Record measurements, substrate and condition. Flag unknowns without claiming a diagnosis beyond your competence.

3. Present

Explain the work sequence, prep, materials, protection, schedule assumptions and who will supervise. Offer good-better-best options only when differences are real and useful.

Show price, inclusions, exclusions, payment milestones, change-order process and warranty in one readable proposal. Avoid pressure or unsupported claims.

4. Follow through

Send a same-day summary when practical: agreed scope, questions, next action and date. Track every open estimate and follow up respectfully.

Use a simple pipeline: New inquiry / Contacted / Visit booked / Proposal sent / Decision pending / Won or lost. Review conversion and reasons weekly.

Consultation notes

Customer goal / decision criteria / scope unknowns / option recommendation

Next step / owner / due date



Practice prompt

Homeowner: “Why is your bid higher?” Respond by comparing scope and preparation, explaining a real option, and asking which concern matters most. Avoid criticizing an unseen competing proposal.

Want coaching and practice on these conversations? Explore Safer Pros Academy Sales Academy: academy.saferpros.com/home-improvement-sales-academy/ • Call 1-800-HIRE-A-PRO (1-800-447-3277).

Sources and further reading

SBA: Marketing and Sales - <https://www.sba.gov/business-guide/manage-your-business/marketing-sales>

FTC: How to Avoid a Home Improvement Scam - <https://consumer.ftc.gov/articles/how-avoid-home-improvement-scam>

OSHA: Small Business Safety - <https://www.osha.gov/smallbusiness>

Educational guidance for U.S. readers. Requirements, permits, licenses, consumer rights and payment rules vary by location and project. Check current local rules and your written agreement. Safer Pros is a referral and project-support platform; participating providers are independent businesses.

Additional notes and next actions
