

# Closing The Sale On Site

By Sydney Schwartz Hardiman

Over the last several years as the economy became worse, I had found that my old ways of doing business were no longer working. In the early years of running my workroom, I could go to a client's house, help them pick out their projects, and then come home to write up my estimate, mail it to the client, and make the sale a week after the initial appointment. But, this idea was no longer working and I needed to reevaluate.

I had read tons of articles about "closing the sale while the prospect is hot." Or "Getting the client while they are most excited about the project." These are all clichés for walking out of your client's house at the end of your first visit with a check in your hand.

The problem though, was how to close the sale on site? All of the articles enthusiastically supported the idea of making the sale, but none of them ever explained how to turn what is often a two-hour estimating process at home into something you could whip up in 20 minutes at a client's home. So I started quizzing everyone about their sales techniques. I even brought a sales expert to our workroom meeting to get tips from her. After months of agonizing I tried out my new technique and found out it worked nine times out of 10.

What I discovered was that first, you must get organized. The more price lists and hardware catalogs you have to look through the longer it's going to take you to write up your estimate, and your customer is going to begin to wonder if you'll ever leave their home. So begin by narrowing down all your choices. Go through your fabric companies and pick three, but no more than four favorites. Unload all the discontinued books, pull the wholesale prices out of the backs of the books, and make sure you have the most up-to-date price lists. For your trim and hardware companies, pick one or two with a broad and simple selection, easy to read price lists, and great customer service.

Next, take a quick trip to the office supply store and get several binders, some plastic sheet covers, and binder

form holders. When you get home label the binders, Labor, Pricing, and Forms on one and Price Books on the other. In the first binder alphabetically put the price books for your fabric, trim, and hardware.

The second binder is the most important one. To keep the pages from ripping, use plastic sheet covers for your price lists.

Add to this your installer's pricing and the price list of anyone you may farm work out to. In the form holder pages, add your forms for work orders, measuring, and your contract.



At the end of the binder add any tip sheets you may need — perhaps on how to calculate repeats, stack back charts, rod pocket pull up charts, and even a reminder of everything you'll need to add to your invoices such as hardware, lining, installation, and even sales tax.

Finally, organize your entire sales kit into one large tote bag. Include the binders, several books to help with design inspiration, an invoice booklet, and a large makeup bag filled with pens, pencils, a calculator, and hard and soft measuring tapes.

Once you've created your new sales system it's time to put it into action.

When you get a call from your next prospective client, spend a few extra minutes on the phone with them. Ask them a series of questions about the project to help narrow down the job as much as possible. What do they want to have done? What room is it? What is the style of the room, traditional or modern? What color paints and furniture is in it now? What sort of fabric do they have in mind? Do they love floral and hate plaid? Do they prefer solids over stripes? The more you can pin down the project before the appointment the

*"I had read tons of articles about "closing the sale while the prospect is hot." Or "Getting the client while they are most excited about the project." All clichés, for walking out of your client's house at the end of your first visit with a check in your hand."*

continued on page 11

## Closing The Sale On Site (continued from page 10)

better prepared you'll be with the right fabric books, and possibly even some initial designs.

When you first get to your client's house, bring in your sales kit, but leave your fabric books in the car. It's better to bring in three or four books that best fit the job than dragging 20 unrelated books in with you. Ask your client to show you the room you will be working on and try and do the entire appointment in that room. It will cut down on time running back and forth to look at the window over and over again.

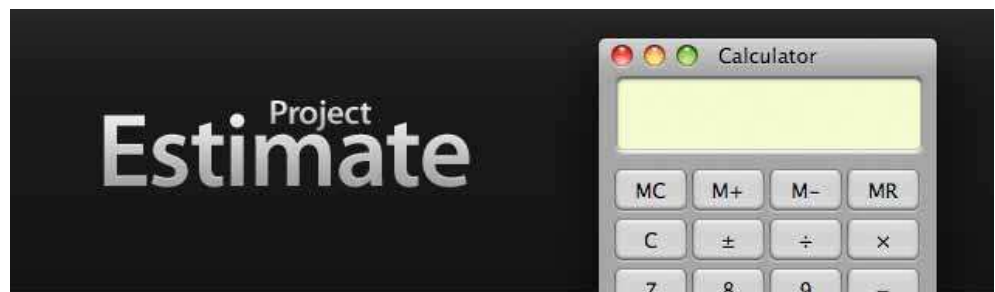
After talking about the design for a couple of minutes pull out your design book and direct the client to the sections they are most interested in. Spend a couple of minutes helping them, and then leave them to look it over while you take your measurements. Once you and the client have narrowed down one or two designs, go out to the car and bring in the fabric books you feel would work best. Let the clients look through them while showing them several you think would work particularly well.

Once all the elements of the design have been chosen ask your client if they have somewhere quiet you can sit for a few minutes while you write up your estimate. If you prefer you can also tell the client you need to work on the estimate in your car. This way you can return the rejected fabric books to the car and write up the estimate in complete peace.

If your client insists on sitting and talking to you while you write the estimate, ask them several opened ended questions. Ones that won't force you pay close attention to the answers, such as, "How did you end up in this city/town/neighborhood." "Tell me more about your business/kids/pets."

Use your price lists and your tip sheets to make sure you don't leave any part of the job out of the estimate and to assure you are calculating your trim and fabric correctly. If you are really concerned about not calculating enough fabric, bump it up by a yard or two. You can always recalculate it at home before ordering, and make yourself look good, by giving the client a discount on their final invoice.

Occasionally, an element of the design will still be undecided in the initial appointment. Perhaps you're still looking for a specific hardware or a contrast fabric. Don't let this stop you from providing the estimate and getting the check. Give your client an estimate for the bulk of the job and put down a "high" estimate for the missing fabric or hardware using a similar product as a guide. On the estimate indicate that the "price will change based on the changes in design." Have the client initial or sign that they acknowledge this. Once you have finalized the design you can send the client a revised estimate and then have them sign off on the new design. Because most people only collect a down payment at the initial appointment it won't make a difference if the final price is lower than the initial estimate.



Finally, confidently present your estimate to the client. Never apologize for your prices and don't negotiate. The more sure you are about your price the less likely your client will be to question it. Explain your down payment process and have them sign your contract. Tell your client about the FTC's Cooling-Off Rule which gives them three days to cancel their purchase for a full refund. Then collect your check, thank your client, and pat yourself on the back for learning a new way of doing business.



Sydney Schwartz Hardiman is the owner of The Silken Scissor, a drapery workroom, located in Pittsburgh, PA. An award winning business owner, Sydney is the founder of the Western PA

Window Treatment Association. She is also the Managing Director of the Women's Small Business Association. She can be reached at 412-734-9746 or visit her website at [www.TheSilkenScissor.com](http://www.TheSilkenScissor.com).