Tool 06: Offer and customer-fit worksheet

Purpose

Say plainly which jobs you want, where, and what drives the price, so the wrong calls filter themselves out before they ring. Leak 5 (Wrong calls), and the base for leaks 2 and 3. Chapters 4 and 10.

Inputs

- Your last 20 completed jobs (type, town, invoice amount, margin if you know it).
- Your last 20 jobs you turned down or lost.
- A map of where your crews actually drive.
- 45 minutes.

Steps

1. **Jobs you want.** From the last 20 completed jobs, circle the ones you'd take 10 more of tomorrow. Write the job types.
2. **Jobs you don't want.** From turned-down and lost jobs, list the types you'd rather never quote.
3. **Real service area.** List the towns your crews reach without losing money on drive time. Not the whole metro unless that's true.
4. **Cost drivers.** For each job type you want, list what makes the price go up or down (size, access, materials, permits, urgency).
5. **Price-range language.** For each job type, decide whether you can publish a typical range or a "starting at" figure, and write the sentence. If you can't, write the cost drivers instead.
6. **One-sentence offer.** "We [job types] for [who] in [towns]. Most jobs [range or what drives the price]. [What happens after you call]."
7. **Filters.** Write the two or three lines your website and listings should carry so the wrong caller stops: jobs you don't do, towns you don't serve, minimum job size if you have one.
8. **The first-call script.** Write how the person answering handles "How much?" before they understand the job.

How to read the result

- If steps 1 and 2 surprise you, trace where those jobs came from before blaming the website.
- If you can't write step 6 in one sentence, homeowners can't repeat it either.
- Posting ranges and cost drivers on the site, and not firing off a number on the phone before you understand the job, are two halves of the same idea. Chapter 10 explains why they don't conflict.

Limits

- Publishing prices can draw complaints from competitors or customers who see the low end. Write ranges with their conditions.
- The studies behind this worksheet (chapters 8 and 10) are vendor or trade surveys with specific conditions. They suggest a direction, not a rule for your trade.
- This worksheet doesn't set your prices. It makes the ones you already have understandable.

Next action

- Put steps 6 and 7 on your homepage and service pages (chapter 8).
- Train the first-call script (chapter 9).
- Run tool 05's call-quality tally again in a month to see if the mix changed.

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