



Canvassing Manual

"Reward, Consequence, Correction, Praise."



Property of Gutter Covers International

PREPARATION CHECKLIST

Computer system set-up
Ad for sales. Put in the following paper
Ad for canvassers (University Website, Newspaper, Flyers, etc.)*
Street map of area * Neighborhoods to canvas (10 years or older & middle income)
Calendar
Tri-fold brochures
Cellular phone for canvassers
Clipboards (10)
Ring-binder for Daily Sales Log
3 hole puncher
6 slot step rack

SUPPLIES

Variety pack sharpies (ultra fine point)
Dry erase boards (1-3x5, 1-2x3)
2x3 cork board
Highlighters (yellow, red, & green)
Dry erase markers
Erasers, tacks, pins, etc .

FORMS

Daily sales log (10)
Handouts (1000)
Reminders (200)
Cellular phone records (10)
Lead status sheet (2)
Confirmation script (1)
Canvasser handbook (10)
Marketer time sheet (4)
Canvass tracking sheet (3)
Map report
Cellular phone agreement (10)
Canvassing script (10)
Job applications
Canvasser report (1 for the month)

FILE SET-UP

- Original forms (green folder)
- Future leads (every Monday & beginning of each month)
- Marketer time sheet
- Telemarketer
- Advertising
- Canvass daily
- Cellular phone record (completed & blanks)
- Pitch/Miss for rehash

STAFFING A CANVASS MANAGER

For continuing results, it is imperative that a careful selection is made when employing a manager for the canvass program. Nevertheless, not having the ideal applicant should not prevent a company from instituting a canvassing program. The best candidate will often rise up through the ranks. Therefore it is important to keep in mind that the person who initially helps establish the canvass program may not remain as the manager long term.

When searching for the ideal applicant, take into account that you are looking for someone who is willing to go door-to-door with the canvassers on a daily basis. This potential employee should understand that running a canvass force is not something that can be accomplished from in the office or behind a desk. This is the type of managerial position that requires hands-on supervision and training while in the field. It is impossible to run a successful canvass program without a strong "field" manager.

There are some administrative responsibilities associated with managing the canvass force. Tasks such as payroll and flyer maintenance will require some in-office time, however, these are latent functions. The main function is to lead by example in the field on a daily basis assisting other in the primary goal which is lead generation. Many organizations have failed to try to manage a canvass force from afar. Having the right hands-on manager is the key to the efficiency and productivity of your canvass program.

The sample classified ad on the following page is designed to elicit calls from candidates that fit the description we have described in the above paragraphs. Remember that during the interview process, it is important to give an accurate depiction of the responsibility of the canvass manager. Do not sugarcoat! Let them know that they will be facing a tremendous amount of rejection. Also, be sure to convey the fact that they will be expected to knock on doors even when it is dark and cold. By being upfront and honest about the pros and cons of the job, you will surely decipher between the right candidates and the wrong ones.

THE CANVASS HANDBOOK

The handbook on the proceeding pages includes the recommended pay, and bonus schedules, as well as other related structures required to run and maintain a successful canvass force. A handbook of this nature should be provided to newly hired canvassers once they have completed an observation day and have committed to becoming new employees.

It is imperative that the canvass manager know and understand the details of the Canvass Handbook. This has the job description and the requirements that are expected of the employees he or she will be supervising.

The structure is the key to maintaining a successful canvass program. If schedules are not taken and guidelines are not followed, the canvass force will run you! Sales and demo results should be posted daily to provide positive reinforcement and motivation to the canvassers.

In addition to sales and demo results, the point system outlined in the canvas handbook also acts as a means of motivation. Even more importantly, the point system helps monitor the individual performance in a fun way, when in reality it is a quota. Canvassers should be rewarded and praised for stellar performance. By the same token, canvassers who are struggling should be trained and examined. This point system is a great way of evaluating who needs a pat on the back and who needs a kick in the tail.

Welcome to _____ canvassing force! We wish you a long, lucrative career with us. Before you get started, we would like to outline the responsibilities and requirements of your position.

- Your job as a _____ canvasser is to find and create likely buyers of our products and services: [name some products & services]
- As a canvasser you are to schedule as many appointments with these “likely buyers” as possible during each shift.
- _____ will provide all the necessary training you will need with the respect to product knowledge as well as communication skills of persuasion.
- The _____ canvass force offers six shifts a week. These shifts last approximately four hours each.
- Schedules are taken every _____. Canvassers are required to work four shifts per week, and a minimum of two Saturdays a month.
- The _____ canvass compensation is \$25 per confirmed lead. Upon completing 60 days of employment, you will receive \$35 per confirmed lead. Earning will be forfeited if the customer cancels the appointment. If the appointment is rescheduled by us due to a 1-leg or no home, you will ONLY be paid for the initial appointment.
- Canvassers are awarded points for their performance. Accumulated points are another way to increase your earnings. The canvass point system works as follows:
 - 1 point per PITCH MISS
 - 2 points per Rehash sales
 - 3 points per sale
- When a canvasser earns 15 points in a calendar month, he/she receives a \$75.00 bonus. When a canvasser earns 20 points in a month, he/she receives a \$100.00 bonus. The canvasser with the most points in a calendar month is dubbed “Canvasser of the Month”. The prestigious title yields a \$200.00 bonus. There is a 20-point minimum for this bonus.
- Canvassers are rewarded for recruiting new employees. The bonus is \$100.00 payable upon the new employee’s net approved sale or combined sales over \$2,000.
- If the use of a mailer is required to reschedule a canvass appointment, the canvass commission is reduced to \$50.00 to compensate for postage, printing, and giveaways.
- Canvassers, who fail to earn six points in a calendar month after one full month of employment, will be placed on “warning”. If one fails to earn six points in a calendar month, in back-to-back months, they will be terminated.
- Maintaining an accurate schedule is very crucial to our business. Therefore, we require notification of any schedule changes 24 hours before the shift. If one fails to notify _____ that they cannot work at least 24 hours before each shift, they will be docked on lead payment. The lead payment is \$25/ \$35 per lead.
- If your employment with _____ is to cease by termination or voluntarily, any bonus monies due to you after your last day of employment will be forfeited.

- A. Crew leads are responsible for leading and guiding a crew of canvassers out to a designated site.
- B. Crew leaders receive \$5 per confirmed lead on crew members.
- C. Crew leaders must EARN 12 points per month to maintain the position and pay.
- is not the only business in this area, that markets by using canvassers. There are a few other organizations that operate with similar marketing programs. It is not our intention to spend the time and effort required to train canvassers, only to have them leave our organization to canvass for one of our competitors. With this in mind, we require our canvassers to refrain from working for our competition for a period of one year from their date of resignation and or termination.

RECRUITING & HIRING CANVASSERS

Recruiting can often be the most challenging task when building a canvassing program. This is why it is crucial that one pays close attention to the 8 proven techniques listed below.

- Use the “ultimate part-time job” flyer by placing it on vehicles at local community colleges, university groups, etc. Anywhere people between the ages of 18 and 22 congregate.
- Place these small flyers on the driver’s side window by sticking them in the black weather stripping on the window.
- Do NOT post similar signs or flyers on bulletin boards, job boards, or guidance offices of career centers. THIS DOES NOT WORK!! In order to successfully recruit, you must run the numbers. You will only get calls if you distribute hundreds of flyers on the vehicles of the people you are trying to recruit.
- Stick to the colleges where the students are more money hungry. Avoid the high tuition school where the parents are often paying all the bills.
- Always ask for forgiveness before you ask for permission! What this means is very simple, do NOT approach the administration of schools, colleges, and universities asking for permission to place flyers in the student lot. They will ask five or ten superiors before they give you the answer of NO. Then they will offer to post the flyer in the career center, which we already know does NOT work! There are no laws against distributing flyers. It is a form of freedom of speech and more importantly the flyers work.
- If and when approached by security and you are asked to stop, simply ask for forgiveness. The likelihood of being stopped is very rare, especially when the small discrete flyers are used. The idea is for the flyers to be in plain view to the vehicle’s owner, but difficult for anyone else to see.
- In cases where security is extreme, stand at the nearest traffic light by the school, and pass out the flyers to every stopped car when the light turns red. Having a large sign works well in these cases.
- Use the “part-time job” script to handle the phone calls that come in from the vehicle flyers. Do NOT try to sell to explain the job on the phone. Schedule an observation day so that the applicant can see the job firsthand. Remember, if you confuse them you lose them. This is a unique position, it can’t be explained, and it must be demonstrated.

Student: *I'm calling about the part-time job.*

Company: What's your name and telephone number?

Student: *Tom Jones (216) 555-1212*

Company: Where did you get the flyer?

Student: *XYZ Community College*

Company: Let me tell you the hours of the job and see if it conflicts with school. The hours are Monday – Friday, 4-8 pm, and Saturday 10-2 pm, with a day or 2 off in between. Will that fit your class schedule? Great! Just to let you know a little bit about us, we are [briefly state what kind of company]; we specialize in [name specialization]. We use college students to do all our advertising by passing our flyers in local neighborhoods and letting people know about our product. Our interviews are four (4) hours long! They are what we call “observation days”. This allows you to come in and check out the job firsthand. We would send you to a neighborhood with a group of students already working there so you can see if this is the right job for you. All our interviews start at 4 pm and end at 8 pm. We have openings Monday – Friday. When is the best day for you to come in and check it out? Would today be good or is tomorrow better for you?

Student: *I have a question...*

Company: I am not qualified to answer that question. However, I would prefer that you schedule an interview where all your questions can be answered. Would tomorrow at 4 pm be good or would the next day be better?

CANVASSING HIRING & PROSPECTING

I. Job Advertising

A. Canvassing Manager

- Management/Self Starter/Organized/Detailed Oriented
- Top Salary/Bonuses/Great Opportunity/Start today
- Call

B. Canvassing Supervisor / Canvassers

- Part-Time/Make Top \$\$\$/Bonuses
- Great for College Students/Start Today
- Call

C. Canvassing Confirmer

- In-house Phone Work/Part-Time Work
- Handle Multiple Tasks/Organized/People Oriented
- Great for College Students/Start Today
- Call

D. Other methods to advertise for canvassers.

- Hang help wanted ads/signs on various college/community billboards
- Advertise at home-shows / trade shows / etc.
- Contact counselors at colleges / high schools
- Advertise at Retirement Centers
- Referrals from current canvassers, and incentive programs. This one method can be your most effective means to hire additional canvassers

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 - I have learned that older people, preferably retired people, did better at canvassing, most of the canvassers were high-school and college-age students, between the ages of 17-22 years old. Here are some reasons why older people may be better to hire, if possible:
- Better Work Ethic
- More Dependable
- More Credibility at the Doorstep
- More Mature
- Will Push the Appointment Set Harder

My recommendation is to also advertise internal, as well as in the local newspaper(s), to an individual in the office for the Canvassing Manager/ Team Leader. I have seen in the past that an individual with a year or so of experience in the company, who is young and energetic, is a perfect match for this position. If the canvassing manager meets their job expectations, they should make good money. As I stated, also advertise in the local newspaper(s).

Regarding the canvassers, I would try to advertise at the local colleges. The reason is, that this is a great part-time job for college students and a good canvasser can make up to \$75 dollars a day (great money for a college student) if the program is structured more bonus oriented. We can speak more about the payment options.

Also use either high school or college students to pass flyers at local high schools, community colleges, colleges, etc. Anywhere people between the ages of 16 – 22 gather together.

II. Interviewing

A. When doing the job interviewing emphasize the following points

- Great Pay
- Easy Work
- Flexible and Great Hours, ideal hours for college students
- Superb Training
- Great Work Environment

B. Materials Needed

- Applications
- Interview Questions
- Job Expectations
- Hiring Forms

III. Work Shifts

A. Hours

-
-



WE ARE HIRING

\$10 - \$15 Per Hour

Make Great Money

Build Your Resume

Work with Friends

No Manual Labor

Fun Atmosphere

CONTACT US TODAY

[INSERT COMPANY CONTACT INFO]

TRAINING & TOOLS

Training newly hired canvassers is a crucial part of running a successful program. If the canvassers are not trained quickly and efficiently, they will encounter more rejection than they can tolerate. Too much rejection can cause anyone to become demoralized. This will result in a rapid turnover. Preparing the canvassers with the proper techniques and skills will yield a successful outcome.

First Two Weeks

- Product Knowledge (One Day)
- Presentation Manual / Book
- Written Script and Rebuttals
- Review and sign off company policy manual
- In-House Script and Rebuttal Training – to Manager and other Canvassers
- Test
- First two days – walk with manager/lead canvasser/supervisor; creating one-on-one coaching
- Canvass on Own
- Canvasser Meeting before each day – to go over the previous day's activities
- In-House Script and Rebuttal Training – to Manager and other Canvassers

Broken Down Into Each Day:

Day One – The potential canvasser accompanies a veteran canvasser on an observation day. The prospective employee says nothing and does nothing. The only thing required of the observer is that they listen closely and determine whether or not they have the type of personality required to do the job. If the observer decides to begin employment, give them a copy of the canvass script and ask them to review it before the following shift.

Day Two – The new trainee observes for yet another day attempting to digest all of the information necessary to begin canvassing. Toward the end of this shift, the new trainee could attempt to canvass a few doors. The veteran canvasser will still accompany the trainee to these doors and intervene if necessary.

Day Three – The new trainee tags along with a veteran canvasser for one last time. The new trainee observes at some doors and canvasses at others. The veteran canvasser or the canvass manager should critique the trainee's presentation and delivery as they are walking between houses.

Day Four and Beyond – The new canvassers are expected to canvass on their own and be responsible for generating leads each shift. This new canvasser should always be able to ask for advice from the canvass manager or other more experienced canvassers. The best training is the critiquing that follows immediately after the homeowner closes the door. You can praise them for their efforts and techniques as well as tell them what they could have said differently to help them get the lead. In-office role-playing should be done daily before the canvassers are dispatched to the neighborhoods for canvassing. This cuts the learning curve into a fraction of the time it would take to learn by trial and error at the front door.

I would suggest sending one team leader with three / four canvassers daily. This allows for the team leader to oversee the canvassers, as well as canvassing themselves. This type of format also allowed the other team members to work together, assured that if a canvasser or two missed a particular day, a minimum of two to three canvassers from that team would be canvassing.

Next, creating teams assists with the training process of the canvassers. If the canvassers are speaking, then they are sharing thoughts and ideas.

Most importantly, the team leader role is important because accountability is assured between the canvassers. Also, sending canvassers in teams, assures accountability because more eyes are watching.

All canvassers should be observed every week by the canvassing manager and team leader! The idea is to develop two to three key team leaders that can assist the canvassing manager.

Remember, while it is expensive to train people, it is even more expensive not to train them.

Canvasser Tools

- Canvasser badge / identification form / sales representative full name / business full name, address and telephone – fax number
- Daily Objectives / Goals
- Daily Forms
 - » Lead Ticket
 - » Daily Lead Report
- Village/Township Permit (if applicable)
- BBB Certificate
- Product literature (detailed description of goods and services) / samples
- Marketing Brochures / Flyers / Promo Items
- Clip Board
- Pens
- Company Clothing, if applicable
- Cell phone/walkie-talkie, if applicable

MOTIVATING THE CANVASS FORCE

There are many low-cost ways to keep the canvass force motivated. Unfortunately, some individuals will be more motivated than others. We often see the “eighty / twenty” rule occur as it does in many sales forces. This simply means that twenty percent of your canvassers produce eighty percent of the results. Nevertheless, the following bonuses and tactics work quite well to maximize performance. Don't be afraid to implement your contests and competitions that you feel may increase production.

The Grab Bag – Get \$500.00 in the following denominations;

- | | |
|------------------------------|-------------------------|
| 1 - One hundred dollar bill. | 2 - Fifty dollar bills. |
| 5 - Twenty dollar bills. | 10 - Five dollar bills. |
| 20 - Five dollar bills. | |

Role up the bills like cigarettes and place them in a big. Set a goal. For example, 4 confirmed leads in one shift = 1 grab in the bag.

You can constantly change the goal based on what the business needs. This is powerful. This can be used to fill empty lead slots that you may have in your schedule. For example, if your schedule is open on Tuesday, you can run a grab bag bonus for any canvasser who generates two leads for Tuesday.

This is a win/win situation. The business gets what it needs, and canvassers get what they need – immediate gratification.

Most canvassers live paycheck to paycheck. The grab bag enables them to get their hands on some cash in between those distant paydays. This also helps lure people away from the food service industry. Most people won't leave their job as a waiter, waitress, or bartender because of the cash tips. Many of the people in that industry are very personable and oftentimes make great canvassers.

Keep in mind, after all is said and done, the average cost of a grab in the bag is about thirteen dollars. A fairly cheap way to motivate.

A grab bag full of five hundred dollars should last a person at least one full month.

Darts

Write various dollar amounts on many little pieces of paper. Place each one inside an inflated balloon. At the end of the shift, give the outstanding performers three darts. When they strike a balloon, pay them the amount of money written on the piece of paper that was inside.

The Prize Wheel

Divide up a circle into sections just like a pizza or a pie. In each triangular portion write in the name of a prize or a bonus. You can be as simple or elaborate as you like. Only canvassers who attain a certain goal should get a spin at the prize wheel. You can do this on a daily, weekly, or monthly basis. The spinning of the wheel should be done in front of the entire canvass force just to stir up excitement.

Shoot to Win

Place a basketball hoop or a putting green in the room where your canvassers reside. Set a goal. Any canvassers who attain that goal get a chance to make a basket or put a hole in one. If they make the basket or the hole in one, they win a cash bonus or some other desirable prize. This is a great way to keep costs down because great performance does not always ensure a bonus, they also have to meet another challenge before any money or prizes can be earned. This also keeps the work environment fun.

Battling Teams

Schedule a day at the beginning of the month to have a draft. Have veteran canvassers act as team captains and draft players for their teams. Once the teams have been assembled have them battle against each other until the month or sales period is finished. The winning team should be rewarded with some type of group activity i.e. a party, ball game, concert, or another special event. The number of Demos each team has is a good way to gauge the performance.

Any time a bonus or a prize is awarded it should be done in front of the entire canvass force. This reminds them that stellar performance is always rewarded. Hopefully, this will ignite a fire within the others in the group.

SCOUTING & TARGETING YOUR MARKET

Nobody knows your customer better than you do. Searching for the ideal demographics to target is colossal to the success of canvassing. This is the perfect example of how working smart and not hard can yield an amazing difference in results. By sending your canvass teams to the right areas you will not only ensure their success, but you will also increase the success of your sales force.

When searching for the perfect neighborhood it is important to consider many factors. Aspects like the age and value of the homes, as well as the average income and credit of the owners, should be considered. The percentage of rental property in the area is another thing to bear in mind. The nature of the product or products that you are canvassing for is also important.

Homeowners with older homes always have maintenance-related projects. These other projects act as a serious hindrance to a canvasser. While canvassing in older neighborhoods, most homeowners complain that they must complete many other necessary projects like windows, and kitchens before they even begin to consider gutters.

Just because you have recently installed a job in a neighborhood does not mean it is a good location for canvassing. Stick to the right demographic and work smart not hard. This will have a tremendous impact on the success of the canvass program.

CANVASSING FLYERS

Sorry About The Noise

This flyer is to be used when canvassing in neighborhoods where your company does not yet have any installations. The story associated with using this flyer is apologizing for any noise or debris we will be making in the future. We will be doing work in your area soon. This flyer should be extended to the homeowner at the front door. Make the homeowners reach for it so they are forced to open the storm door and interact with you. This introduction is a great way to get the interest of a homeowner even in an area where you have never done any business.

[Company] would like to apologize to you and your neighbors for any noise soon. We will be installing new gutters! The comfort and appearance your neighbors will receive from their newly installed home improvement will give them all the excitement and efficiency of a brand new home located at the same address. Your neighbors were able to take advantage of the special savings offer that we are willing to extend to you. What are you waiting for, call [Company] today for your free, no-obligation estimate? Don't delay, call today!

Sincerely,

Company Name Address

[Signature of CEO]

Appointment Sheet

This particular appointment sheet is meant specifically for canvassing. The customer information must be taken in the order that the sheet is designed. There is an excellent reason for this. When canvassing we want to assume the appointment. That is why the address is first. When a canvasser sees that a homeowner has shown even the slightest interest, they immediately begin writing down the address. This is the most effective way to assume the appointment. In addition, the following information is taken using a special technique called the rule of six. This is designed to extract three yeses from the homeowner. This method establishes a yes momentum and makes our job a lot easier.

Reminder

This flyer has two functions. It serves as an appointment reminder to the homeowner. The flyer should be a bright color so that it draws a lot of attention. Ask the homeowner to hang this flyer on the refrigerator so that all decision-making parties are aware of the appointment. The second function of this flyer is to exhibit the company's credibility and reliability. The back of this flyer should contain the number of promotions or programs that your company offers. This will help the customer retain some of the information that you talked about on their doorstep. This is a very important step in scheduling a solid appointment time.

Door Hanger

This is to be used when no one is home. Put on the doorknob of the front door. *NOTE: Be sure canvasser puts their name on all flyers.

SET AN APPOINTMENT

Appointment Day: _____ Date: _____ Time: _____

First: _____ Last: _____

Address: _____ City: _____ Zip: _____

Home Phone: _____ Primary: _____ Secondary: _____

Email Address: _____

Best Time to Confirm: _____ Confirmed by: _____ Date & Time: _____

Appt. Set Date: _____ Audit Scheduler: _____ Crew-Chief: _____

How old is your home? _____

How long have you owned your home? _____

What type of roof do you have? _____

Do you have any trees that are clogging your gutters? _____

(If yes) What kind? Oak, Pine, Maple? _____

How often do you clean your gutters? _____

Do me a favor and remind _____ why we stopped by so we don't catch him/her by Surprise.

Comments:

LEAD REPORT

LEAD REPORT

Name: _____ Phone: _____ Date: _____

Address: _____ City: _____

State: _____ Zip: _____

Appt Date: _____ Time: _____

HOW DID YOU HEAR ABOUT US? _____

Follow up Needed _____

NOTES:

LEAD REPORT

Name: _____ Phone: _____ Date: _____

Address: _____ City: _____

State: _____ Zip: _____

Appt Date: _____ Time: _____

HOW DID YOU HEAR ABOUT US? _____

Follow up Needed _____

NOTES:

CONFIRMING THE CANVASS LEAD

A strong emphasis needs to be placed on the proper confirmation process of canvassed leads. There are a couple of proven systems that can be used to increase the quality of the canvassed leads being submitted. It is necessary to adhere to these systems so that the leads that are being generated are qualified with sold appointment times. If the leads are not confirmed properly, they will become very inefficient and the number of leads that convert into demos will decrease dramatically.

The best way to solidify a canvassed lead is to ask the prospect if you can use their home telephone. Tell the homeowner that you need to call the appointment into the office and log it on the computer so that you do not overbook. This makes the homeowner feel much more obligated to the appointment.

If a phone is not available, the leads must be confirmed at the end of each shift. This must be done in the presence of the canvassers who generated the leads. This prevents any false leads from being submitted. The canvassers now know that you are going to call the leads and investigate them directly in front of them. By confirming the leads in front of the entire group, each canvasser can be commended for submitting strong leads and criticized for submitting weak or unqualified leads. If you confirm the leads after they leave, they are off the hook.

If a canvasser submits an unqualified lead, for example, a lead that is set with a child, a renter, or a repair, you can ask the prospect in the presence of that canvasser if that had been disclosed at the front door. This smokes out any unqualified leads and teaches the canvasser to focus on the only qualified candidates. After a brief period of confirming the leads in this fashion, canvassers begin to draw a correlation between the leads that confirm well and the leads that do not. This helps them to improve so they can place an equal emphasis on quality as well as quantity.

The important thing is to stick with it. The system for confirming the canvass leads must stay intact. The tendency for most companies who have tried canvassing is to get lenient in the confirmation process. This weakens the leads and misrepresents the true high quality of the canvass lead.

SCRIPTS & REBUTTALS

The following scripts have proven to be the absolute most effective method to generate leads at the front door. These scripts were developed and written by a group of individuals who have collectively knocked on hundreds of thousands of doors.

Human nature causes people to dislike and avoid rejection. So often times, individuals try to change or re-invent this canvass script. They change it because it does not work at every door. Changing the script is the recipe for disaster. Rejection is inevitable. Even the best canvassers only generate leads at 20% of the doors on which they knock. Do NOT stray or vary from this already proven method for success. It is better to perfect one way of canvassing than continually try new methods. One cannot stay sharp if they are constantly searching for a newer and easier way.

The script should be memorized. It is not necessary to have every word exactly the same each time you canvass. You do not want to sound like a robot. However, the techniques and principles that are written into the script give it the potency it needs to persuade and convince. There is only one way to memorize the script. Practice it out loud over and over again. It is similar to an actor trying to remember lines. They must be rehearsed out loud. Roll playing with managers and other canvassers will ensure your rapid retention of the script.

Once the script has been memorized, the canvassers can stop focusing on what they are saying and start focusing on what the prospect is saying. This is huge! By directing one's attention to the homeowner's action and body language they will greatly increase their production. This is why sticking with the system is the fastest track to success.

I'm Sorry

Hi !! Real Simple! We are here in the neighborhood to apologize in advance for any noise you may be hearing in the next few weeks. We will be having crews in the neighborhood installing (PRODUCT). During this time we will have representatives, as a matter of fact, on this very street tomorrow giving free no-obligation estimates to homeowners like yourself for the if and when you decide to do a project like this, so with that in mind are mornings like this good for you, or are afternoons more convenient?

Inviting

Real simple, we're just inviting all neighbors down to _____ do you know where that is? Great, we just finished up and just wanted to make sure the neighbors checked out the work. For the next couple of days, we're going to have a representative on this very street giving out FREE ESTIMATES. With that in mind, are mornings like this good, or do you think afternoons would be better for you?

Customer Response: *I'm not interested.*

No problem, can I ask you a question?

Customer Response: *Sure*

Have you ever had an estimate before?

Customer Response *No.*

No? Well, the only reason I asked is that I've talked to several of your neighbors on this very street, and they are all complaining. We're just going to be talking to all your neighbors and letting them know how to alleviate the concerns, so with that in mind are mornings like this good, or are the afternoons more convenient for you?

Customer Response: *Yes have had estimates*

Really, may I ask whom from? How much was it?

WOW, I completely understand how you feel I've spoken with several neighbors that have had estimates from other companies, but they found out we're different. So with that in mind, are mornings like this good, or would afternoons be more convenient for you?

Customer Response: *Can't afford*

No problem, I understand how you feel several of our customers felt the same way, they know they wanted the work done, they knew they needed the work down, but they just thought it wasn't going to fit into their budget for a few years. When they talked to us, they found out we're a different company. So with that in mind are mornings like this good or would afternoons be better for you?

Additional Objections

Customer Response: *I don't like to give out my phone number.*

No problem, the only reason I ask is to give you a courtesy call before we stop by to make sure it is still convenient for you. With the springtime coming up we understand how busy some people can be. So the number here is...

Customer Response: *Still No*

We don't telemarket or use the number for any other purpose, and if you would like, I can have the representative bring this sheet of paper with your number on it back to you to destroy, fair enough?

Customer Response: *I think I'm going to do the work myself / I have a relative in the business.*

Hey no problem, I understand how you feel, several of our customers were going to do the work themselves some are pretty handy guys, but when they talked to us they found out that we're different. We saved them a boatload of time; we gave them a lifetime warranty on the work and a 24-hour service hotline. Those are savings and guarantees you just can't get if you do the work yourself. So with that in mind are mornings like this good or would afternoons be better for you?

Customer Response: *Leave the estimate in the mailbox / I make the decision, you can talk to me.*

I'm afraid we can't do that; can I ask you a question? I'm selling a car for \$500; do you think that is a fair price? You can't answer that without seeing it right? That is why we don't give you a price on one of our products without letting you see it first. We let you choose the styles, colors, and quality level, the main factors of what the price is going to be. We don't need a lot of time; we just want to educate you on what the price would be. So with that in mind, are you generally around in the mornings, or are afternoons better for you?

CONFIRMATION SCRIPT

Get canvasser name-write on the top left corner of the lead report
Get customer name, phone number, and appointment date and time.
Ask to speak to the customer.

STEP 1

Hello, Mr./Mrs. _____. This is _____ from _____
How are you today? I understand we are scheduled to come out to see you tomorrow at _____ to give you a free estimate.

Is it just yourself or is there a Mr./Mrs? Also? GREAT! (If not Mr./Mrs. Proceed to Step 3)

STEP 2

If there is a Mr./Mrs.) OK, will this time be good for him/her also? (If not set time which is good for both?) Proceed to Step 3.

STEP 3

And you do own the home there, correct? Great! Just in case my estimator is running a few minutes late, which he never does, this won't interfere with any other plans you may have, such as church functions, bowling leagues, or doctor's appointments? I'm sorry; I forgot to ask my representative, what is your address? GREAT! And what is the nearest street that runs into that? OK. I have your phone number as _____. Is that correct?

FANTASTIC! We're looking forward to seeing you both on (day and time). Thank you. Goodbye!

CONFIRMATION SCRIPT

Not Interested

Customer Response: *I'm not interested.*

No problem, can I ask you a question? Customer Response Sure Have you ever had an estimate before?

Customer Response: *No.*

No? Well, the only reason I asked is that I've talked to several of your neighbors on this very street, and they are all complaining. We're just going to be talking to all your neighbors and letting them know how to alleviate the concerns, so with that in mind are mornings like this good, or are the afternoons more convenient for you?

Customer Response: *Yes have had estimates*

Really, may I ask whom from? How much was it? (Fake a heart attack) WOW, I completely understand how you feel, in fact, I've spoken with several neighbors that have had estimates from companies, but they found out we're different. So with that in mind, are mornings like this good, or would afternoons be more convenient for you?

Can't Afford

Customer Response: *Can't afford*

No problem, I understand how you feel, in fact, several of our customers felt the same way, they know they wanted the work done, they knew they needed the work done, but they just thought it wasn't going to fit into their budget for a few years. When they talked to us, they found out we're a different company. So with that in mind are mornings like this good or would afternoons be better for you?

Additional Scripts & Rebuttals

A. When starting the presentation, be sure that the canvasser covers these important items

- Hit every House, move quickly, speak clearly with enthusiasm
- Create a trust factor with the homeowner
- Always make sure you are speaking to the homeowner; to the point and brief in a 45-second time-frame
- Name – Uses his / her name to start the conversation
- Company – the credibility of the company representing, offer information immediately
- Referral – Doing work in the area. This establishes credibility for the homeowner
- Product – The products that the company is offering and any information
- Always know your competition or something about other products. Remember, you are there to set the appointment!

B. Key Phrases

- We have done "X Amount" of work in this area over the past week, month, and year in this area!
- We have had "X Amount" of satisfied customers over the past week, month, year in this area!
- Speak loudly and clearly with enthusiasm and sincerity
- Always ask for the lead at least two to three times

C. Incentive Door Offerings

- Vary from day-to-day / week-to-week
- FIRST IMPRESSION (Shake their hand if they will open the door; always step away from the door so they can open it. Always have a smile on. This lets the person opening door know how happy you are to be there representing our company. Always remember that you are the first impression of our company).
- FIND INTEREST I just want to take just a few moments of your time to let you know why we are out in your area today. We are in the area today passing out some flyers to let you know who we are and what we do at our company. We have been in your neighborhood doing some work and I hope we did not disturb you.

While I am out here today may I ask you a question? Who cleans your gutters?
WAIT FOR THEM TO ANSWER YOU

If they say they clean their own gutters, ask them if they are getting tired of doing that.
WAIT FOR THEM TO ANSWER YOU

_____ has been in business for over (#) of years and is family owned and operated. We have a gutter protection system and are unmatched in the industry. It is a system designed to keep debris out of your gutters. You can say goodbye to cleaning gutters forever – finally, there is a simple solution for messy gutters.

While we are out in the area we would like to have one of our factory-trained representatives come to your home and give a free estimate and explain the benefits of our product.

I have some openings on _____ which one of those days would be good for you. Is morning or afternoon better for you?

BE SPECIFIC AND ALWAYS ASK FOR THE APPOINTMENT, TWO TO THREE TIMES. ON YOUR LEAD TICKETS (ATTACHED) GET AS MUCH INFORMATION FROM THE HOMEOWNER AS YOU CAN

1. Look to see the kind of roof
2. Check the color of the shingles and home
3. Get the cross streets

ALWAYS MAKE SURE THE HOMEOWNER HAS SIGNED THE LEAD TICKET

CANVASS TRACKING FORMS

Marketer Time Sheet

Used for keeping track of hours worked, miles that are driven, pitch/misses, and installations.

Canvassing Track Sheet

While in the field, track people spoken to, not home, and rentals. Write down miles driven.

Daily Canvass Results

Take totals from the canvass track sheet, and keep track of individual canvassers on daily basis.

Canvasser Report

Take totals from daily canvass results as a group. Transfer to canvasser report. Keep track of canvasser's results as a group daily.

Canvassing Daily Results

Keep track of canvassing total results daily.

Marketer Report

Keep track of individual canvassers' results weekly and monthly.

Phone Agreement

Agreement with canvasser being responsible for cell phone and non-work-related calls.

Phone Roster

Sign out sheet for cell phone every shift.

Daily Sales Log

Record all confirmed appointments and enter detailed results of the appointment. Be sure to write the last amount left with the customer for all pitches/misses.

Sold Status Report

Keeps detailed status of all sales. Starts off pending either re-decision or financing, then to ready to order, on order, and completed. Also tracks cancellations.

CANVASS TRACKING FORMS

Definition of canvassing: I use the term "canvassing" in this report to mean direct face-to-face contact with residents at their homes. I am not using the term to describe "literature drops" which is leaving information on a residential doorstep without personal contact. Even though I recommend leaving information if the homeowner is not home, this report is based on face-to-face contact with the homeowner.

Why Canvassing can be effective: Canvassing allows for face-to-face contact with a resident so information can be presented to address personal or site-specific concerns in a way that generic information cannot. Canvassing conveys a sense of urgency to residents because the action or opinion being requested is immediately at their doorstep. For these reasons, canvassers requesting a specific action will be more successful in achieving that action at the door than leaving the information to be completed later.

Measuring the effectiveness of canvassing: To determine how effective canvassing can be and which method to use, it is essential to be clear on the goals of the effort: to educate and answer questions; to encourage residents to take a specific action or to sign people up for a program, etc. Generally, the effectiveness of a canvasser can only be gauged by the actions that occur at the door.

General rules of canvassing: On any given night, 50% of the residents will not be home. If canvassers return on a second night, they will contact 50% of the residents that weren't home the first time. Canvassing is most effective when done in the evening hours of 4-9 p.m., depending upon the season.

CANVASS TRACKING FORMS

Canvassing Advantages

- Demo to companies desired demographical areas
- Canvasser is establishing a trust factor with the homeowner for the company and before the sales representative's visit
- Most cost-effective cold call means of marketing
- Lead is initially non-competitive, assuring a higher closing percentage for the sales representative
- Canvassers act as testimonials
- Flexibility in canvassing
- Industry averages show a higher demo and closing rate
- A great source for finding future sales representatives
- Able to answer specific questions of the homeowners
- Can target different ethnic areas
- Industry average shows a low recession and lead cost Canvassing

Disadvantages

- Accountability
 - Work being done away from the office
 - Hard to continually watch the canvassers (watch for cheating and stealing)
 - High Maintenance program
- May need permits
- High turnover ratio
- Weather
- Time intensive

CANVASS MAPPING & PRE-CANVASS MARKETING

Process

Use a "wave" approach. Move directionally (ex. eastward) and blanket 1 or 2 neighborhoods at a time. Canvassing is done in a systematic approach to making callbacks possible. They leave door hangers on the failed attempt to reach a resident. Canvass on an eight to ten-week schedule. The canvassing Manager and Canvassing Team Leader determine areas to canvass.

Items

- The most up-to-date map/street guide. This map/street guide has to be precise, updated, and clear – with all street names. Purchase a map/guide that allows the manager to make copies and distribute them to each team. This is used to determine daily canvassing routes, as well as the neighborhoods that have been canvassed.
- Each team must be assigned an area/neighborhood to canvass.
- Notate each map for each team in similar colors. Be sure to display the maps in the canvassing rooms for each team to see the other teams' successes and failures.

Pre-Canvassing Marketing

- Send postcard and brochure mailings (Direct Mailer Programs) to owner-occupied homes in the entire target area at the beginning of the season. Each volunteer follows maps and walking lists of 40-50 houses. Canvassers leave door hangers if owners are not home.

- Area where yard signs have been placed
- Make Telemarketing Calls in the entire target area.
- Home-Shows
- Current Jobs being Installed (MOST IMPORTANT)
- Past Jobs Installed (MOST IMPORTANT)

CANVASSEER DROP PROGRAMS

Canvassers Sales Options, delivered to your customer's front door

ALWAYS LEAVE A FLYER AND / OR INFORMATION WITH THE HOMEOWNER

ALSO, ALWAYS BE SURE THAT THE CANVASSEER LEAVES THEIR INITIALS ON THE FLYER IF THEIR PAY SCALE IS CALCULATED BY LEADS GENERATED.

Fliers and/or Circulars

Most well-known tool of direct distribution. Very easy to read and can catch the customer's attention with special offers and sharp visuals.

Always have an offer to create an incentive

Coupons

Have the canvasser offer coupons to the homeowner for agreeing to schedule an appointment. This attracts homeowners for additional sales opportunities (repeat customers). Be sure coupons are recognizable and easy to read. Coupons can also be offered to homeowners for referrals. Remember, coupons reward present product users and encourage larger quantity purchases. Very important, coupons let the company/manufacture determine whether it reached its' intended market.

Contests & Sweepstakes

Competing for contests and sweepstakes generate retail traffic (add potential customers / short-term interest in sales or market share). Be sure they submit their name, and they sign the customer contact form, allowing us to bypass the no-call list if they are listed. Also, a great way to get users to visit your website.

APPOINTMENT SET

Contact in-House Scheduler

(Script) Hello (name of scheduler), this is canvasser and I am with Mr. /Mrs. Homeowner. I am in the process of scheduling an appointment with Mr. /Mrs. Homeowner. Give the in-house scheduler the following information.

- Homeowner Name
- Homeowner Address
- Homeowner Telephone Number
- Date and Time of Appointment

Now hand the phone to the Homeowner for confirmation between the scheduler and the Homeowner.

After confirmation has been completed, always read back the address/phone number / and the date & time of the appointment to the homeowner.

Give the homeowner a copy of the appointment ticket, and any literature to be left with the homeowner.

Tell them to hang it on the refrigerator so they don't forget and let them know the office will call the day before to confirm the date and time.

Thank the homeowner for the appointment (shake their hand).

Let them know if they have any questions please feel free to call our office, and let them know if they call the day before the appointment they will receive an extra "x" % off.

When appointments are set, be sure that the homeowner signs the appointment sheet, agreeing to the appointment (create).

Confirmer Script

Hello, Mr. / Mrs. this is _____ calling from _____. Mr. / Mrs., you recently were scheduled to receive a no-obligation appointment presentation and quote on _____.

I want to thank you for scheduling an appointment and for your interest in _____. What I would like to do is confirm the day and time our factory-trained sales representative will visit to show a working sample. Please remember, being the number one in the industry, I want to be sure that both will be at the appointment. Once you get the commitment, repeat the date and time at least one more time.

We look forward to meeting both of you and you will see why we have become the number "ONE" in the industry today. Have a great evening and we look forward to seeing both of you.

Requirements of an Appointment

- People must own home
- Definite time must be set
- All interested parties must be present
- Evidence of economic stability
- We must point out their need for product and stimulate their interest
- No new construction
- No contractors

CANVASSER PAY DAY PROGRAMS

Option #1

-
-
-
-

Point system

-
-

Experienced Canvasser that can pitch

-
-
-
-
-
-
-

Option #2

-
-
-

Point system

-
-
-
-
-
-
-
-
-

Team Goals

Create an environment that the team has shared goals. This creates excitement and bonding with the team. It is at that time that they become passionate and work together.

Emphasize that team goals make work fun, training fun and give the total effort a purpose.

Four canvassers on a team – 90 points

Five canvassers on a team – 110 points

Pay \$100 for meeting team goals

CANVASSER MUST WORK A MINIMUM OF THREE DAYS A WEEK AND TWO (2) SATURDAYS

CANVASSER MUST SET A MINIMUM OF THREE LEADS A DAY

MUST MEET A MINIMUM OF 15 POINTS A MONTH

COMPANY IS AUTHORIZED TO CHARGE BACK A BONUS IF JOB IS NOT COMPLETED

CANVASSER MANAGER PAY OPTIONS

1. \$500 Weekly Salary
2. \$1.50 Demo Rate for entire canvassing crew
3. \$3.00 Sale Rate for entire Canvassing crew

Canvassing Manager Job Descriptions

- Must be extremely trustworthy, honest, be able to handle multiple tasks, be responsible and be willing to complete any and all responsibilities in the department
- Canvassing Manager must follow all established company policies and does not have the authority to make any exceptions to any company policy without approval of management
- Canvassing Manager Hours will be as follows:
 -
 -
 -
 -
- Canvassing Manager should be given a "Flyer" budget, to match his canvassers
- Canvassing Manager should be given a "Help Wanted" budget. To be determined by area
- Canvassing Manager will be responsible ultimately responsible to:
 - Prospecting, Hire and fire all canvassers in his department
 - Office Personnel (In-House)
 - Process Payroll, including monitoring;
 - Hours worked
 - Commissions earned (set appointments / appointments sold)
 - Bonuses earned
- Canvassers Daily / Weekly / Monthly Statistics
 - Quality of leads
- Daily Canvassing Setup
 - Including mapping canvassers daily activities
- Individual Training (Field and In-House)
- Team Training (Field and In-House)
- Canvassing Team Leaders job descriptions met
- Canvassers job descriptions met
- Departmental Supplies
- Follow Company Policies

Private Contractor: _____

Date: _____

Employer: _____

Date: _____

CANVASSER MANAGER JOB DESCRIPTION

The purpose of the canvass manager is to provide direction to the canvass force. This must be done in a multitude of ways. As mentioned previously, it is important that the canvass manager is willing to roll up his or her sleeves and go door-to-door. You can not ask your troops to go to battle if you are not willing to do so yourself. It is impossible to manage a canvass force from behind a desk or in an office when the people you are supposed to be managing are in the field. The ideal canvass manager handles the administrative duties: schedules, maps, and payroll before the canvassers arrive. This frees up the time to spend in the field helping the canvasser to improve.

The upside-down pyramid management style is most effective when running a canvass force. The upside-down pyramid is a management system in which the manager works for the employee. This is a great contrast to most management styles which resemble a normal pyramid, where the employee works for the manager. The canvass manager should spend 90% of his or her time helping the canvassers improve. This could be in the office roll playing a simulated front door display, or in the field actually generating leads with a canvasser. Any leads that the manager generates should be given to the canvasser he or she is training at the time.

The canvass manager should never be paid for personal performance. The entire purpose of this position is to train new employees and maintain current canvassers. If the manager is being paid on personal accolades, they will abandon the more important task which is to build and improve the group. The pay plan on the following page is geared toward compensating the manager based on the entire group's performance. This is the only way to stay committed to the cause. The pay plan is also very budget-minded in an effort to keep the lead costs in line.

Managers should conduct a daily meeting at the beginning of each canvass shift. During this meeting, canvassers should be praised for the results from the previous day's sales and demos. Roll playing should take place at every meeting. This role-playing acts as a great warm-up before hitting the streets. Repetitive roll playing also keeps everyone on the same page, preventing canvassers from reinventing the wheel and changing the script. When the canvassers return to the office at the end of each shift, the manager should confirm each lead before submitting them.

Compensation Plan

Annual Salary = _____

Monthly Incentive & Bonus Program = _____

Stipulation in order to receive a monthly bonus: _____

Minimum Monthly Net Volume Requirement: _____

Canvass payroll must not exceed 8% of the revenue that is generated: _____

Responsibilities

- _____
- _____
- _____
- _____
- _____
- _____

TEAM LEADER PAY OPTIONS

Option #1

-
-
-

Point system

-
-

Experienced Canvasser that can pitch

-
-
-
-
-

Bonus system

-
-
-
-

Option #2

-
-

Point System

-
-

Experienced Canvasser

-
-
-
-
-

Bonus system

-
-
-
-

TEAM LEADER JOB DESCRIPTION

Must be extremely trustworthy, show signs of leadership, honesty, responsibility and integrity

One week probationary policy. After one week, canvasser team leader is expected to meet all expectations. If quota is not made after the one week training period, canvasser team leader is placed on one week probation. If quota is not met after one week probation period, then canvasser team leader is delegated to a canvasser. Note that the team leader will be monitored by his personal and team productivity.

Team Leaders must meet canvassers job descriptions

Team Leader must work a minimum of Five (5) days a week

Team Leader must set a minimum of three (3) days a week

Team Leader must meet minimum of 15 points a month and company is authorized to charge back a bonus if job is not completed

Oversee Canvassers daily activities, including:

- In-house Training
 - Canvassing training
 - Daily meetings with the canvassers, before daily canvassing sessions
 - Work directly with canvassing manager to organize daily travel and assignments
- Field Training
 - Canvassing training
 - Encourage & Motivate
 - Monitor canvassers
 - Track daily / weekly/ monthly reports – canvassers quota's
 - Tracking daily canvassing mapping
 - Keep accurate records of hours worked and set appointments by canvassing team
 - Authority to place canvasser on probations or terminate canvassers, with canvassing manager approval

Transportation

- Responsible for transportation of canvassers from office to canvassing area. A weekly or mileage reimbursement will be in place

Follow Company Policies

Private Contractor: _____

Date: _____

Employer: _____

Date: _____

CANVASSERS JOB DESCRIPTION

One week probationary policy. After one week, canvasser is expected to meet all expectations. If quota is not made after the one-week training period, canvasser is placed on two-week probation. If quota is not met after two-week probation period, then canvasser is released from his / her duties at the company.

Goals

- Individual
 - Visit approximately forty (40) to 50 (fifty) homes a day
 - Speak with all homeowners, with the objective of setting an appointment. If homeowner is not available, canvasser will leave flyer at home
 - Canvasser required to complete a daily log of homes seen and leads set
 - Of leads set by canvasser, confirmation rate of appointments must be eighty percent (80%)
- Team
 - Two (2) canvassers, eighty (80) to one hundred (100) homes a night
 - Three (3) canvassers, one hundred twenty (120) to one hundred fifty (150) homes a night
 - Four (4) canvassers, one hundred sixty (160) to two hundred (200) homes a night

Set Appointments

- Individual
 - Each individual must set a minimum of three (3) appointments per day
 - Submit daily reports to canvassing team leader
- Team
 - Each member of the team must set a minimum of three (3) appointments per day

Sold Appointments

- Of the canvassers set appointment, a minimum of thirty percent (30%) must be sold jobs

Work Schedule

- Canvassers must work a minimum of three (3) days a week

Honor System

- Canvasser is expected to be honorable in submitting leads. If for any reason leads submitted are "bad" leads, canvasser is subjected to probation and / or termination

Weather

- Canvasser is expected to work regardless of weather, if directed by canvassing team leader and / or canvassing manager

Work Schedule

- Canvasser must be punctual and work their required job schedule. A call must be placed to canvassing team leader and / or canvassing manager, if unable to work required job schedule

Dress

- Company shirts, either golf / t-shirts
- Khaki pants

Follow company policies

Private Contractor: _____

Date: _____

Employer: _____

Date: _____

DRIVER LIABILITY FORM

This AGREEMENT made this _____ day of _____, _____ by and between _____ (Private contractor), hereinafter referred to as Private Contractor, and _____ (employer), hereinafter referred to as Employer/Business Owner(s), the parties hereto, hereby agree that the Employer/Business Owner shall not be liable for any damages and/or injuries that may occur during any and all working hours when the Private Contractor is transporting company personnel in their automobile to assigned work areas and the Private Contractor is required to show proof of Insurance on the first business day of every month verifying that the proper automobile insurance is in place. If any damage and / or injury occurs during the transportation of company personnel to their assigned work areas, any and all claims shall be filed and submitted to the Private Contractor (insured individual of the vehicle) insurance agency.

Private Contractor: _____

Date: _____

Employer: _____

Date: _____

PRIVATE CONTRACTOR LIABILITY FORM

This AGREEMENT made this _____ day of _____, _____ by and between _____ (Private contractor), hereinafter referred to as Private Contractor, and _____ (employer) hereinafter referred to as Employer/Business Owner(s), the parties hereto, hereby agree that the Employer/Business Owner shall not be liable for any injuries that may occur during any and all working hours when the Private Contractor is representing the Employer during any and all business hours. If any injury occurs during any and all business hours, the Private Contractor must use their means of insurance and payment if admittance is required to any health facility and medical attention/procedures are required. If Private Contractor is terminated for cause or resigns without a two (2) week notice, all funds due to the Private Contractor will be held and kept until the Private Contractors work has been processed and all equipment and / or supplies have been returned to the company.

Private Contractor: _____

Date: _____

Employer: _____

Date: _____

TEN COMMANDMENTS FOR CANVASSERS

- Always think positive.
- Know the Presentation.
- Set your daily goals.
- Find the customer's need and create the desire for a demonstration.
- Sell yourself enthusiastically.
- Sell the product—The Appointment.
- Listen to what the customer has to say.
- Overcome all objections.
- Be diplomatic/courteous.
- Be friendly, warm, and always professional.

PROSPECTING METHODS

- TELEPHONE SOLICITATION
- DIRECT MARKETING
- DOOR-TO-DOOR CANVASS
- CANVASS AROUND JOBS
- ADDITIONAL PRODUCTS TO EXISTING CUSTOMERS
- COMMERCIALS
- HOME SHOWS
- REWORKING LEADS
- CUSTOMER REFERRALS
- INTERNET DEFINITION

To prospect means to explore, to examine or test. Prospecting by telephone is the most effective method of interviewing a homeowner. You must talk with the homeowner only!

As you adapt the script to your personality you will begin to arouse a sincere interest in our products. When this is mastered, you will have the prospective customer eagerly awaiting our representative's visit to their home.

Be prepared to talk with either Mr. or Mrs., but you must create enough interest to make an appointment when both husband, wife or all interested parties are available at home. Telemarketers must learn to control the prospecting interview. They must learn to command and stimulate the homeowner's interest.

IMPORTANT: HAVE A FORMALIZED PRESENTATION

Overview

Through years of study, trial and error, it has been proven that the use of a formalized presentation will achieve greater results than any other method. The common goal between the Lead and Sales Departments can only be THE SALE. Sales are created from

Personally Developed Leads

Good leads are developed by carefully utilizing the MESSAGE of the presentation. Your goal is to make a lasting impression on the person with whom you are speaking. The presentation (script) is the message being communicated between you and the homeowner. The presentation contains a series of ideas which, when properly communicated to the homeowner, should arouse their interest. When this interest is aroused, the prospect will react to our presentation in a positive way. Your aim is to evoke a sense of urgency to Act Now!

Good leads are developed by carefully utilizing the MESSAGE of the presentation. Your goal is to make a lasting impression on the person with whom you are speaking. The presentation (script) is the message being communicated between you and the homeowner. The presentation contains a series of ideas which, when properly communicated to the homeowner, should arouse their interest. When this interest is aroused, the prospect will react to our presentation in a positive way. Your aim is to evoke a sense of urgency to Act Now!

When we stimulate the homeowner's interest and ignite a sense of urgency to Act Now—the homeowner will agree and schedule an appointment. Our goal is to set an appointment within the next 2-3 days from the day of contact. Once this is achieved, you have accomplished your goal. The Sales Department now has the responsibility to run with the ball and get what we all want—THE SALE! Therefore, it is important that you do not stray far from the script!

The Opening Statement (Helpful Hints)

- You must have a reason for them to be Interested (saving money, comfort, Beauty, etc.)
- Take advantage of cold calls—"I've got a product that has helped others like you save 35%."
- Be prepared with an opening statement. Don't try to close in the first 20 seconds —People become defensive when they feel you've gone immediately into a rehearsed pitch.
- Make it brief—get to the point! Remember: you are most likely interrupting someone.
- Be professional, yet cheerful & friendly. The script can not be read—don't confuse the script with a canned speech.
- Be straightforward, be direct—don't be pushy. The customer's defenses are already up.
- Use caution not to 'push them over the top.'

HOW TO PROSPECT: THE PRESENTATION

"Prospecting for profits" used in conjunction with an effective script prepares a telemarketer to make appointments in person. Learn to follow the steps below:

STEP 1: Identify yourself and the company by name

STEP 2: Establish rapport enthusiastically with warmth while Maintaining professionalism.

STEP 3: Generate interest—focus attention on the benefits and Features of our products

STEP 4: Fact finding—age, construction of house

STEP 5: Sales message—define need, clarify features and benefits

STEP 6: Ask for the appointment.

STEP 7: Overcome objections and then ask for the appointment again.

STEP 8: Confirm appointment date and time. Confirm that spouse will be there.

STEP 9: Express sincere thanks

Before the homeowner will listen to you or your product, he/she must like you. You must keep a friendly SMILE on your face and in your voice. You must be POLITE. You speak SLOWLY and DISTINCTLY. You LISTEN and ACKNOWLEDGE the comments and questions of the homeowner.

Use a relaxed, informal, yet conversational tone in order to establish where the homeowner works when determining economic stability. (Knowing the kind of work that is done could come in handy later on.)

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Remember to sell the appointment and not the product.

Do:

Tell the prospect why you have stopped by. Talk about beauty, safety, comfort, economy, and protection. Talk about free estimate. Talk about no obligation: that a sales representative will analyze their needs and help solve their maintenance problems.

Do not:

Talk about materials or price. Save the actual arrangements of the sale, price, etc. for the appointment when the sales representative is in the home with Mr. And Mrs. Homeowner.

SELLING SKILLS

The selling process involves three basic skills:

- PROBING—to gather information and uncover customer need
- SUPPORTING—to satisfy customer needs with benefits
- CLOSING—to gain customer commitment

PROBING is one of the most important skills in selling, especially in canvassing. Without probing a prospect, you cannot discover their needs that relate to our Product. And, without needs, you cannot sell.

Probing means, “asking questions”—but more than that, it means asking them in such a way, that you lead the prospect so as to get relevant information about their home.

There are two kinds of probes: OPEN and CLOSED

OPEN PROBES will encourage a customer to respond freely. These answers require more than a simple yes or no answer. The following words will help you form an open probe question:

WHO HOW WHEN TELL ME WHAT WHY WHERE

CLOSED PROBES limit the range of a customer's response to a yes or no, answer, or to a choice among alternatives that you supply. The key words that will help you to identify a closed probe include:

DO HAVE DOES IS WHICH ARE OR

SUPPORTING is accomplished by making a supporting statement when:

You have uncovered a customer's need

You feel you have a clear understanding of the need

When you support you do two things:

- Acknowledge the customer's needs
- Briefly describe how their need will be satisfied. Introduce the appropriate product(s) that will satisfy the need.

Phrases that you may utilize to begin a statement of acknowledgment include:

- I agree.....
- You are absolutely right about.....
- I can see how that could be an issue, however.....
- Exactly....
- I can understand your concern....
- Yes, that's a good question....
- Let's explore that idea.....

CLOSING occurs when the customer gives you a "buying signal." To close:

- Slow down the pace.
- Speak in a carefree yet confident tone.
- Determine the appointment time.
- Wrap-up. Confirm commitment. Now to accomplish your goal ask for the sale.

PRE-POSITION LEAVE BEHIND ON SET APPOINTMENT

Dear Homeowner,

We offer this report to inform homeowners about the tactics being used by unscrupulous and dishonest contractors. This problem is so widespread that we feel every consumer should read this report before making a decision!

Have you ever been frustrated or aggravated trying to figure out whom you can trust? How can you be assured that when you spend your hard-earned money you'll get exactly what you pay for?

If you are frustrated, you're not alone. Haven't we all heard the "nightmare stories" of the high-pressure salespeople, botched jobs, scam artists, fly-by-niters, unfinished jobs, and general lack of professionalism? Pretty scary stuff!

Let's face it; the bad apples of the industry have really made it hard for the consumer to figure out the "good guys" from the "bad guys". You can't pick up a newspaper or watch TV without seeing another story about somebody who had a terrible experience with his or her home project.

Imagine:

The "contractor" drove up in an old beat-up work truck with garbage and crushed beer cans in the back window. He was wearing a shirt that he hadn't changed for the last seven days that said, "!!*#! Happens". His offer was about sixty-five hundred dollars. He scribbled the estimate down. He never showed you any samples of products, no before-and-after pictures, no customer referrals, and no proof of a license or insurance. Then, he said that we would have to pay three thousand dollars up front for "supplies", and he would "probably" be back to start in a few weeks.

Please! You could smell that rip-off artist a mile away. He low-balled the price just to try to sucker you in. He's probably looking for the cash so that he can high tail it out of town with your hard-earned money. I wonder how many people he has taken advantage of?

There must be a better way to get the quality-remodeling job that I want?

There is, that's why we supply this report.

SECRETS

SECRET #1 - AVOID THE TWO BIGGEST MISCONCEPTIONS

Misconception Number One: Don't just believe what the contractor tells you--make him show you! This is a common and often costly mistake. Many contractors tell you they are members of an organization, but they have no proof of it. If they have no proof, you need to investigate the company further. Don't ever make a decision just based on the contractor's here-say.

Misconception Number Two: Going with the lowest price saves you money. No, not necessarily! Everyone tends to look for the lowest price. On a low estimate, you must ask yourself, "what is being left out", or "what shortcut is being taken"? Everyone wants three things whenever they are making a purchase: (1) Low Prices, (2) Best Quality, and (3) Best Service. It's impossible to get all three, hence the old adage, "you get what you pay for". You must ask yourself, "Which of the three am I willing to give up?" Let me explain...

Like anything else, you can't get something for nothing. Be careful of choosing your contractor based upon the lowest price. Before you accept a low price, you should consider the level of service involved, the type of company you're choosing, the project's design, and the project's specifications. Though price is always a consideration, you should be more concerned with value. Try to get the best contractor you can find and the highest quality work for your money.

SECRET #2 - DON'T FALL FOR THE COMMON SCAMS

The most common ploy disreputable contractors use to pressure folks into signing a contract is the discount. This is an old "tin man" sales story that promises you a steep discount for signing a contract right then.

The scam centers on the need to use your home as a model to advertise their services in the neighborhood to get more jobs. If you allow them to use your home as a "show home" for advertising purposes, they'll rebate several thousands dollars to you. The only catch is that you must sign now! This trick is as old as they come; yet it still nets hundreds and hundreds of people!

If a contractor is offering some "special deal", ask them to legitimize what they are offering. For example, if it is an advertising promotion they are looking to do, ask them for documentation or samples of flyers or literature that they are intending to mail or hand deliver.

SECRET #3 – BEWARE OF THE “DOOR-TO-DOOR” HANDYMEN!

These people may not be contractors at all. Never allow them into your home until you have checked them out thoroughly! This can't be stressed enough. You have seen or heard the stories many times on the nightly news shows about two men claiming to be contractors entering homes. One took the homeowner on a pretend sales call or inspection while the other guy was going through purses and other personal belongings.

If they happen to be a real company, often times these companies will do a sloppy job (if they even do the job at all). Some start the job and never finish. Others are just looking to get a sizable down payment and run off with your money. It can be so frustrating trying to chase after these guys, getting them to come back and finish the job or clean up a messy work site.

What's worse? Often their work is so inferior, you may need to hire somebody else, at an additional expense to you, to come and fix up all the problems!

Remember that you can't get something for nothing! If someone gives you a "honey of a price" that seems too good to be true, it probably is!

Do you carry general liability insurance? Make sure your contractor carries general liability insurance. This type of insurance protects your property in case of damage caused by the contractor and/or their employees. The insurance company will pay for the cost of replacing and/or repairing any damage that may occur.

Do you carry workman's compensation insurance? Make sure your contractor has workman's compensation insurance. It protects you from liability if a worker is injured while on your property. Be aware that if your contractor doesn't carry workman's compensation coverage, you may be liable for any injuries suffered by any of the contractor's employees on your property. Some contractors will tell you that your homeowners insurance will cover them against injury. Do not believe this lie. Most policies specifically exclude coverage for injuries to hired contractors. If the contractor does carry workman's compensation insurance ask them to show you a copy of their policy.

It's always a good idea to consider hiring a contractor that belongs to at least one if not all of them. Here's why: In most cases these associations attract only conscientious contractors interested in improving the industry and weeding out unprofessional builders and remodelers. Secondly, in order to become a member, these associations investigate a contractor's background and references. Thirdly, all members must sign a written code of ethics and pledge to professionalism. Most members take this pledge very seriously.

Will you pull the required permits? Make sure your contractor pulls all the required permits. This is very important. When a contractor pulls the required permits, you know things will be done "to code". Many prefer not to pull permits because of the time involved and the "hassle" with the inspectors. Some contractors may ask you to get the permits. This may be a warning sign that they aren't able to pull the permits because they are unlicensed, or the work is outside of their license. A reputable contractor will pull a permit on every job where a permit is required.

Do you guarantee your work? Your contractor should guarantee their work. I've always felt that if you can't guarantee it, don't build it. I believe every job should be backed with a workman warranty. Many contractors will not guarantee their work. Some may provide you with a one or two year workmanship warranty. Most faulty workmanship will easily be detected within this one or two year period. If a contractor won't guarantee it, don't buy it.

Will you provide me with written references? Your contractor should gladly provide you with references. You should look for a well-established contractor who can give you several customer references – usually previous customers from the last six months to a year. Make sure the company has a physical presence this gives you a place where you know you can find them and indicates they are financially sound and won't be declaring bankruptcy in the middle of your project.

What percentage of your business is repeat or referral business? When a significant source of a contractor's business is derived from repeat and referral business, it usually indicates that their clients are pleased with the work they've received.

How many projects like mine have you completed in the last year? Your contractor should be experienced.

How do you handle your clean up? A clean work site is fundamental to a smooth remodeling project. Your contractor should clean up any debris at the end of each day and dispose of any rubbish at the conclusion of the work. Your home should be left "broom swept".

SECRET #5 – THE BIGGEST MISTAKE HOMEOWNERS MAKE AND HOW YOU CAN AVOID IT!

Far and away the number one mistake most homeowners make costing them a fortune is, they do NOT choose a professional contractor to work on their home. Well, how do you know if you REALLY are dealing with a professional?

Here's what to do, after you ask for and receive client references...call them! You can never learn too much about the person who you are considering accepting. Take a few minutes to inspect a job. Ask for information on the time needed to complete these jobs and if the jobs were completed on budget.

SECRET #6 – HOW TO TELL IF YOUR PROJECT WILL RUN SMOOTH, BEFORE YOU SIGN THE CONTRACT!

Good Communication. If you can talk with each other, you can work out any details that come up. When you call can you get in touch with someone? Does he return a call promptly? Does he listen to you? Does he answer all your questions and concerns thoroughly? Nothing is more important than feeling that your contractor understands your needs and concerns. If your contractor is so busy that he can't return your calls promptly, maybe it is time to look for a new contractor. When you are in a discussion, does the contractor really listen to you? I mean really listen. This is vital.

Comfort. If you feel comfortable with your contractor, the chances are good your project will run smoothly. Think about it. You've just invited a stranger into your house. Do you find this person nice? Considerate? Personable? A Listener? Was he polite and courteous? Or did he make you feel that he wasn't interested? You will be working with this person for a matter of days, weeks, or months depending upon the project you need completed. Can you stand to have this person around?

Trustworthy. If you feel your contractor is trustworthy, the likelihood of a successful project is good. Check his references. Keep in mind that if your project demands entrance into your home and you won't be home during the day, the keys to your castle will be given to your contractor. Can you trust him or her? Listen to your conscience.

Completion. Will your contractor give you a reasonable estimate for how long the project will take to complete? A good contractor will do this. Remember that you want to hire a good contractor, not a new roommate! Nothing is more frustrating and irritating than a remodeling job that drags on and on.

Written Contract. I can't tell you how many contractors I have seen look at rather complex jobs, pick a price out of thin air, scribble a figure only on the back of their business card, and give the card to the homeowner. Show contractors who do this the door! You want a detailed, written contract that shows what is included: exact materials, brand names and cost. It is one thing to be informal with an estimate, it is quite another to try and do business without a formal contract.

Details. Work out the little details before work begins. Talk about things like: Where the dumpster goes, or where the debris pile will be created? When will the project begin? Who can you contact at the office with questions?

Appearance. If your contractor has a neat appearance, this is a very good sign of things to come. This may sound silly, but it's not. He doesn't have to show up in a coat and tie, but neatness does count. Is he clean? Is his vehicle presentable, or falling apart? If his appearance is neat, chances are good he will keep your job and your home neat too.

Down Payment. If the contractor asks for a big chunk of money up front, this could be a tip-off that they are not in good financial shape and you could be in for a rocky experience. A fair down payment should not exceed one third, unless custom ordered items are needed in the beginning stage of construction. As the work progresses, you should expect to pay out additional funds to match the prescribed, complete stages.

Change Orders. There is always the chance that you may want or need to change a material or contract item. Ask how these are handled. They should be written on a separate document showing in detail what is being changed and how much it will cost. This should be done before the change is affected and signed by both the contractor and homeowner. Good communication is the key to determining how the rest of the project will go. If you can talk with each other, you can work out any details that might come up.

SECRET #7 – PLAN YOUR PROJECT!

This is really the greatest "secret" of all! Plan your project with a qualified expert! Most people spend more time planning a one-week vacation than they do a major remodel to their home. If you're considering a remodel in the near future, sitting down and talking with a professional remodeling expert who can answer all of your questions is the best advice I know.

Someone who can help you through a "maze" of planning a job. Someone who will listen to your every concern. Someone who subscribes to the principals and "secrets" described above.

As you might have guessed, this is the only way we work here at (Company Name). Initially we provided you a FREE, NO OBLIGATION meeting to find out what your concerns are, and determine if we can be of help to you and your family. Hopefully, we can show you, as we have thousands of others, how to make their home absolutely gorgeous, something really to be proud of! Sounds good, doesn't it?

If all this makes sense, and you are curious about our approach to remodeling, please give us a call. We'll be happy to answer all of your questions for free.

Well, you are now properly prepared to solicit estimates for your home remodeling project. Do you feel wiser? I hope so. At (Company Name), we feel it is important for you to be comfortable with your contractor. So if you should ever need siding, windows or doors please consider allowing us to educate you on your project and provide you with a competitive estimate.

Remember that when a representative visits your home, we are not going to use high-pressure sales tactics. It is simply a chance for you to meet us and see if our services can benefit you. If, after our meeting, you believe there is no benefit to be derived from working with us, we simply leave period. If, however, you do find that you would like our help, we will discuss how we proceed from there.

I can't think of a better way to work. Can you? If you think my approach is fair and honest, please consider us for your gutter protection needs. Best of luck!