COMPANY FRAMEWORK

The Field Guide

Good work does not close itself. This is the hour where the job is actually won, what to do in it, and what to say when it goes the other way.

FOR BUSINESSES THAT SELL WORK AT AN APPOINTMENT
31 CHAPTERS
FIRST EDITION

What this is

A book about one hour. The hour between arriving at somebody's property and leaving it, which is where almost every job in a trade business is won or lost, and which almost nobody has ever written down.

It assumes you sell work at an appointment. Somebody asks you to come and look, you look, and you leave with a price on work that has not been done yet. The nouns change between trades. The hour does not.

If the price is on a list before you arrive, or the customer can evaluate the work themselves, most of this will not apply to you. Better to find that out on this page than on page ninety.

What it is not

It is not a book of closing techniques. There are no lines in here designed to make somebody agree to something they did not want. Every sentence in this book is one you could say to a friend without embarrassment, and that is the test each of them had to pass.

It is also not motivational. Nothing here asks anybody to want it more. Every recurring failure in this book turns out to be structural, which means it is produced by a sequence rather than by a person, and which means it can be fixed by changing the sequence rather than by changing the person.

Who it is for

The person running the appointment. That may be somebody who works for you. It may be you, with nobody else, and four other jobs to do the same week.

Both readers get the same book, because the hour is the same hour. Where something only applies to a business with more than one person in it, that is said out loud.

How to read it at two speeds

Every chapter opens with a one-line summary and three short lines under it. That is the whole chapter in about twenty seconds, and on a week when there is no time, it is enough.

Underneath is the reasoning, the wording, and what goes wrong when the step is skipped. The subheadings are written as statements rather than labels, so the page can be read down the left-hand side on its own and still make sense.

Every chapter ends with one line worth carrying. If nothing else from a chapter survives the week, that line should.

So: read the short versions and the carry lines straight through in one sitting, which takes under half an hour and gives you the argument. Then come back to whichever chapter is currently costing you money and read it properly.

About the sentences

There are a great many exact sentences in here. They are not scripts to memorize. They are there because the words are usually the part people get wrong, and because a sentence somebody can say out loud is more useful than a principle they agree with.

Every figure in this book is one you produce from your own work. There are no benchmarks in here, no industry averages, and no numbers taken from anybody else's business. If a number appears, it came from an example that says where it came from.

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THE SPINE

The Nine Steps

The whole appointment on one page. Everything after this is one of these nine, explained.

This page is the book. The thirty-one chapters that follow are these nine steps taken one at a time, with the reasoning underneath and the words that make each of them work.

Tear this page out. It is the only thing here that needs to be in the vehicle.

	STEP	WHAT HAS TO HAPPEN
1	**Read the file**	What they said the problem was, how long they have been there, where they came from, and anything anybody already promised them. Do not arrive cold.
2	**Call ahead**	Same interval every time. Confirm the time, ask where to park, and ask whether everybody who decides will be there.
3	**Arrive and set the shape**	Be a person for thirty seconds. Then say what the next hour contains, in order, including that today can end in a decision if it makes sense to them.
4	**Find out what they are solving**	Why now. How long they have been there. How old it is. Who else has looked. Timing. How they expect to pay. Who else decides. And what they want to be holding by the end of today.
5	**Say it back**	Summarize what you heard, out loud, before you go outside. The answer you are listening for is that is exactly right.
6	**Say the plan, then execute it**	Tell them what you are about to inspect and roughly how long. Then look at the whole thing rather than the part you were shown, and photograph it wide, middle and close, including what is fine.

	STEP	WHAT HAS TO HAPPEN
7	**Come back in before you build**	Do not disappear. Say you have what you need and how long you will be. Then ask whether they want anything adjacent priced as a separate option while you are here.
8	**Show, then recommend, then price**	What you found. What it means. What happens if it is left. What you would do. Recap what is in and what is not. Then the number, once, and stop talking.
9	**Ask**	How are you feeling about everything. Then a question with a question mark on it. If the answer is not today, send everything before you leave and agree a specific day and time.

WHAT THE CUSTOMER SHOULD LEAVE UNDERSTANDING

What was inspected. What was found. What you recommend. What happens next.

If they could not answer all four on their own doorstep after you drive away, one of the nine did not happen.

Bring your personality, do not skip the process

Everybody sells differently and that is fine. This is not a script and none of the words in this book are compulsory. What is compulsory is the order, because each step is what makes the next one possible.

Make a friend. Find a need. Solve their problem. That is steps three through nine in six words, and it is an order rather than a slogan.

CARRY THIS

Communicate clearly. Inspect thoroughly. Ask confidently. Document completely. Follow through.

PART ONE

Why Good Work Does Not Close Itself

Five structural reasons a business that does excellent work loses appointments it should have won, and why none of them is effort.

CHAPTER 1

The Only Variable Anybody Gave Them

A kitchen table, three pieces of paper, and one thing she knows how to compare.

THE SHORT VERSION

- A customer with three quotes and no way to tell them apart will use the one variable anybody gave her, which is price.
- The fix is not explaining harder. It is handing her a page of questions she can put to all three companies, with your answers already on it.
- Do this for the person who was never going to shop you as well. They have never been handed one either.

A homeowner with three quotes in front of her is not being cheap when she picks the lowest one. She is using the only piece of information any of the three of you gave her that she knows how to compare.

Picture her on a Tuesday evening at a kitchen table. Three pieces of paper. All three companies came out. All three were polite. All three told her they do good work, and all three meant it. Two of them showed her something on a phone, briefly. One of them was there for ninety minutes and one was there for twenty, and she cannot now remember which was which, because that detail did not attach to anything.

What she has is three numbers. She has no way to know whether the cheapest one leaves something out, because she does not know what should be in it. She has no way to know whether the expensive one is better or simply more expensive. She does not know what any of the components do. She has never been up there, under there, or behind it, and she never will be.

So she does the only rational thing available to a person with one comparable variable. She compares it.

Every business that loses a job like this tells itself the same story afterwards, and the story is that the customer went cheap. That story is comfortable and it is wrong. She did not go cheap. She was handed one number by three people and asked to choose, and she chose the smallest one, which is what any of us would do at a table with three sealed boxes and a price written on each.

What she was never given

Nobody gave her a way to tell the boxes apart.

That is not a complaint about her. It is a description of the situation every one of your customers is in. Most people buy this kind of work once or twice in a lifetime. They do not know the vocabulary. They do not know which parts of the job are the parts that matter. They do not know which questions would expose a difference, because knowing which questions to ask is itself expertise, and they do not have any.

They are aware of this, and it makes them uneasy, and the unease has a specific shape. It is not really about money. It is about being taken advantage of by somebody who knows more than they do, in a transaction they cannot audit, for an amount that matters to them.

Price is how they try to manage that fear, because price is countable and everything else is not. A customer who says your price is too high is very often saying something closer to: I have no way of knowing whether this number is fair, and the smallest number is the least I can lose.

The uncomfortable version of this

Here is the part that stings. If all three companies gave her the same non-information, then price genuinely is the only sensible tiebreaker, and the cheapest company deserved to win.

That is worth sitting with before you go any further into this book. In the absence of anything else, cheapest is not a failure of the customer's judgment. It is a correct decision made on the evidence available. The failure happened earlier, in an hour that three people spent in her house without leaving her anything she could use.

The fix is not to explain harder

The instinct, once somebody sees this problem, is to explain more. Longer conversations. More detail about the materials. A folder. A better folder.

That does not work, and it does not work for a reason worth understanding, because the same reason will come back several times in this book. More explanation from you is still one company talking about itself. It does not give her a way to compare, because she cannot check any of it, and she knows she cannot check any of it. A person who cannot verify a claim discounts the claim, and the more confident the claim, the more it gets discounted.

What changes the outcome is giving her something she can apply to all three of you.

Not a brochure about your business. A short list of questions she can put to every company including yours, with your own answers already filled in, in writing, before she has asked. Ten questions on one page. What is included. What is not included, and what it would cost if it turns out to be needed. Who is actually going to do the work. What happens if something is found once the work starts. What the warranty covers and who honors it. When money is due. What happens if she is not happy.

Those are not clever questions. That is the point. They are ordinary, they are the ones she would have asked if she had known to, and they are the ones that produce different answers from different companies.

Why handing that over is not a risk

The first objection anybody raises to this is that you are arming the customer to shop you. That objection assumes the customer was not going to shop you, which she was, and it assumes the comparison would otherwise have been on your terms, which it was not.

The real risk runs the other way. If you build a list of questions that only your own company can answer well, everybody can tell. It reads as a sales trick because it is one, and the first person who shows it to one of the other two companies will find out, and you will have spent your credibility on a page.

So the list has to be honest, which means before you hand it out you have to be comfortable with your own answers to all ten. If there is a question on it you would rather she did not put to you, you have exactly two options: take it off the page, or fix the answer. Most businesses that go through this exercise fix two or three answers, and that is not a side effect. That is most of the value.

What it does to the person who was never going to shop

Roughly half the customers who receive a page like this were never getting three quotes. They called one company, they were going to use that company, and the page changes nothing about who they hire.

It still does something, and it is the more valuable half of the effect. It is the clearest description of how you work that they will ever get. Somebody handed a list of questions with your answers already written in has just been told, on one page, what you include, what you do not, who turns up, what happens when something unexpected appears, and when they pay. None of that fits into a conversation without sounding like a speech. On a page it takes them ninety seconds.

Hand it to everybody. The person comparing three quotes uses it to compare. The person comparing nothing uses it to understand. Neither of them has ever been given one before.

The wider version of this idea

The reason this chapter is first is that the same shape shows up everywhere in the appointment, and once you can see it you will recognize it in most of what follows.

Whenever a customer has to make a judgment they are not equipped to make, they will substitute a judgment they are equipped to make. Faced with a technical question they cannot answer, they answer an easier one instead, and then act on that.

Can I evaluate this work becomes: is this price high. Do I understand the recommendation becomes: do I like this person. Is this company competent

becomes: did they turn up when they said they would. Is this urgent becomes: does this person seem to be exaggerating.

None of those substitutions are irrational. Each one is a reasonable proxy for somebody with no other information. But every one of them is a question you can influence, and most businesses influence none of them on purpose.

> THE IDEA UNDER THE WHOLE BOOK
>
> Your customer is going to decide using whatever you leave them with. If the only thing you leave is a number, the number is the decision.
>
> Everything in the rest of this book is a way of leaving them with something else.

What this does not mean

It does not mean price is irrelevant. Price is always relevant, and there are customers for whom it is genuinely the only thing, and no page of questions changes that. You will lose some of those and you should.

It also does not mean you can be more expensive than everybody else forever because you explain yourself well. You cannot. If you are consistently the highest number in the market by a wide margin, the problem is not the appointment and no book about appointments will fix it.

What it means is narrower and more useful. In the ordinary case, where two or three competent companies are within a reasonable distance of each other on price, the one that wins is the one that gave the customer something to decide with. Most of the time nobody does. That gap is the largest, cheapest, most ignored advantage available to a small business in this trade, and it costs a page.

CARRY THIS

Leave them a number and the number is the decision.

CHAPTER 2

Two Ways To Lose An Appointment You Had Already Won

Two people who both believe the appointment went fine.

THE SHORT VERSION

- The quote dropper measures, prices, sends and waits. He closes the people who had already decided and nobody else.
- The visitor is warm, knowledgeable, liked, and leaves without asking. She believes she asked.
- Neither is a character problem. Both are the same broken order of operations, arriving from opposite directions.

There are two ways to do this job badly. Neither of them looks like doing it badly from the inside, which is why both survive for years inside businesses that are otherwise well run.

The first one measures, prices, sends, and waits

He is efficient. He gets through more appointments in a day than anybody else, and if you look only at his calendar he is your best performer. He arrives, he looks at the thing, he takes what he needs, he is polite, and he is gone in twenty-five minutes. The price goes out that evening or the next morning. Then he waits.

Some of those close. The ones that close are the customers who had already decided before he arrived and needed a number to act on. For that customer he is perfect, and cheaper to employ than anybody who takes ninety minutes.

Everybody else was buying a decision rather than a price, and he never sold them one. They were trying to work out whether to do this at all, whether it is as bad as they fear, whether they can trust the company, and what happens if it is worse than it looks. He answered none of those because none of them

were asked out loud, and a person who is uncertain does not usually announce it. They say thanks, that is helpful, send it over.

The thing that keeps this pattern alive is that his numbers are defensible. He runs more appointments than anybody. His close rate is low but he is quick to point out that he takes the hard ones, and sometimes he is right. And because he never spends long anywhere, he is never visibly doing anything wrong. There is no moment you could point to.

What it costs, in the order it costs it

First, every customer who needed a conversation goes to whoever gave them one. That is not usually the cheapest company. It is the one that spent an hour.

Second, the jobs he does sell are smaller than they should be, because he priced what was pointed at rather than what was there. He was never in the property long enough to find the second thing, and the second thing is where most of the margin lives.

Third, and this one takes a year to show up, the work he sells is harder to build. He did not photograph much, he did not write much down, and he was not there long enough to notice the access problem. So somebody else discovers it, on the day, in front of the customer.

The second one is liked by everybody and closes nothing

She is the opposite and she is harder to talk about, because everything she does is genuinely good. She is warm. She knows the work. Customers like her, and they say so. She spends real time, she explains things clearly, and people who meet her come away with a better impression of your company than they had before.

She leaves without a decision. Not because anybody said no, but because nobody was ever asked anything.

The appointment ends with an exchange that both people experience as pleasant and conclusive. She says she will send it over. They say that sounds great. Everybody shakes hands. She drives away believing that went well,

and she is not deluded. It did go well, by every measure except the one that matters.

If you ask her afterwards whether she closed, she will say she presented it and they are thinking about it. If you ask whether she asked for the business, she will say yes, and she will believe that, because from the inside presenting and then pausing feels exactly like asking. The difference between the two is a sentence that ends in a question mark, and she did not say one.

Why this one is almost never corrected

Nobody can see it happening. There is no bad moment. The customer was not annoyed, nothing was mishandled, and the notes afterwards look fine. Any manager listening to her describe the appointment would hear a good appointment, because she is describing a good appointment. She simply left out the last thirty seconds, and she left them out because she does not know they are missing.

Coaching aimed at her usually makes it worse. Told to be more assertive, she becomes uncomfortable, and the discomfort shows, and now the warmest thing about her is gone and the ask still is not happening. The instruction was aimed at her personality when the problem was in her sequence.

The thing both of them have in common

Here is the part worth slowing down for, because it is the whole argument of this book in one paragraph.

Neither of these is a character problem. They are both the same structural problem, arriving from opposite directions. In both cases, the order of operations broke, and the missing step is invisible from inside the appointment.

The right order is that you make a friend, you find the need, and then you solve it. Not a slogan. An order. Each step is the permission for the next one.

Making a friend is what earns you the right to ask real questions. Without it, your questions are an interrogation, and people answer interrogations with the shortest true thing they can get away with. Finding the need is what turns a price into a solution, because a solution has to be a solution to something,

and if you never found out what, the number is free-floating. And solving it is what makes asking for the business reasonable, because you are now offering somebody the thing they told you they wanted.

Run the order and asking is the natural end of a conversation. Skip a step and asking becomes pressure, and the discomfort the visitor feels is not weakness. It is accurate. She never found the need, so asking really would be pressure, and some part of her knows it.

Which means the fix for both is the same fix

You do not fix the quote dropper by telling him to slow down, and you do not fix the visitor by telling her to close harder. Both of those are instructions to be a different person, and they last about two weeks.

You fix both by giving the appointment a shape that has all the steps in it. Once the sequence exists and is run every time, the quote dropper cannot skip discovery without noticing that he skipped it, and the visitor arrives at the ask having earned it, which is the only condition under which she will actually do it.

> THE TEST
>
> Ask somebody to describe how they run an appointment, in order, without prompting.
>
> Somebody with a process narrates the same shape twice. Somebody without one tells you about a customer. Both answers sound fine. Only one of them is a process.

A third kind, briefly, because you will meet him

There is a version that is neither of these and it is worth naming so you do not mistake it for either. He is technically excellent, he inspects thoroughly, he documents beautifully, and he explains at a level of detail that would satisfy an engineer.

He also buries people. The customer who asked whether this is serious receives eleven minutes on the components, and somewhere in the fourth

minute they stop being able to follow it, and they do not say so, because nobody wants to announce that they are lost.

The failure looks like generosity. He is giving them everything he knows. But a person who does not understand the explanation cannot use it to decide, so the explanation, however accurate, has not moved anything. They will fall back on the one variable they can still evaluate, which is the number, and now they are evaluating it while slightly embarrassed.

The correction is not to know less. It is to give the short version and then watch what comes back. A follow-up question is permission to go further. Polite agreement is not, and the minutes spent after that point are subtracting rather than adding.

What good actually looks like

Not a personality. A sequence, run by somebody who sounds like themselves.

The warm one and the blunt one can both be excellent at this, and they will sound nothing alike doing it. What they will have in common is that both of them found out what the customer was actually trying to solve, both of them looked at the whole thing rather than the part that was pointed at, both of them explained what they found before saying a number, and both of them ended the hour with a question.

Style is theirs. The order is not. That distinction is worth saying out loud inside your own business, because most sales coaching gets it backwards: it tries to standardize the personality and leaves the sequence to individual judgment, which is the exact opposite of what works.

CARRY THIS

Style is theirs. The order is not.

CHAPTER 3

What They Are Actually Buying

What the money is actually being spent on.

THE SHORT VERSION

- Nobody wants what you install. They want the problem gone and they want to not be taken advantage of.
- They cannot judge the work, so they judge your behavior, and every item on that list is free and inside your control.
- Long explanations of your own company are wallpaper. Anything checkable is not.

If you asked a customer what they are purchasing, they would describe the work. That answer is wrong, and believing it is why so many appointments are spent explaining the wrong thing at length.

Almost nobody wants what you sell. They want the problem gone, they want to stop having it in the back of their mind, and they want to get through the transaction without being taken advantage of.

That third one is doing more work than most people in this trade realize. It is the quiet variable in nearly every appointment, it is almost never said out loud, and it explains behavior that otherwise looks irrational.

The fear has a shape

The customer is about to spend a significant amount of money with somebody they met an hour ago, on work they cannot inspect, evaluated against a standard they do not know, sold by a person whose interest is obviously in the sale happening.

Read that back. Every element of it is true, from their side, and none of it is unfair to you personally. It is a description of the structure they are standing in.

They have also all heard the stories. Somebody in their family had a contractor who took a deposit and disappeared. Somebody at work had a job that started at one number and finished at another. A neighbor had somebody who did the work badly and then stopped answering. Those stories are not about you and they are in the room before you arrive.

So the question they are quietly running the whole time is not whether the work is needed. It is whether you are safe to deal with. Everything else is downstream of that, including price.

This is why a good explanation can still lose

Somebody who has decided you are safe will accept a brief explanation and a higher number. Somebody who has not decided that will not be talked into it with any amount of technical detail, because more detail from a person they are not sure about is not reassuring. It is more of the thing they cannot verify.

Which is a hard idea for technically strong people to accept. The instinct, when a customer hesitates, is to explain further. If the hesitation is about safety rather than understanding, further explanation is aimed at the wrong target and can actively make it worse, because volume from a stranger reads as pressure.

What they use instead, since they cannot judge the work

They judge you on the things they can judge, and those are all behavioral.

Did you turn up when you said you would. Did you seem to already know why you were there. Did you explain what you were about to do before you did it. Did you go where you said you would go and come back when you said you would. Did you show them what you found rather than assert it. Were your answers consistent with each other. Did you say you did not know something. Did you write anything down. Did what you sent match what you said.

Not one of those is about the work. Every one of them is inside your control, costs nothing, and is being scored.

That list is also the reason preparation matters more than it seems to. A person who arrives already knowing why they are there has passed two items on that list before saying anything about the job.

Consistency is scored harder than expertise

People cannot tell whether your technical claim is right. They can absolutely tell whether two things you said an hour apart agree with each other, and they are better at noticing it than most salespeople assume.

If you say the schedule is about three weeks and later say you could probably start next week if they decide today, you have not created urgency. You have created a small hole. It may not cost you the job on its own, but it lands in the same column as the stories about the deposit and the disappearing contractor, and that column is being totaled.

This is the practical argument for having every number and claim your business makes written down in one place before anybody goes out. Not for tidiness. Because three people answering the same question three ways inside one month is indistinguishable, from the customer's side, from a company that is making it up.

The three things they are buying, in order

First, the problem stops. That is the obvious one and it is the smallest.

Second, they stop carrying it. A lot of people have been aware of this for months and thinking about it for weeks, and a surprising amount of what you are selling is the end of that. It is worth understanding that the relief is the product, because it changes how you talk about what happens next. A person who knows exactly what is going to happen, and when, has already received part of what they are paying for.

Third, they were not taken. This one they will never say. It is also the one that decides whether they refer you, because what people actually tell their neighbors is some version of: they were straight with us.

What this changes about the hour

Mostly, where the time goes.

If they are buying certainty rather than the work, then the parts of the appointment that produce certainty are the valuable parts, and they are not the parts most people spend time on. Setting out what is about to happen, before it happens, produces certainty. Showing somebody what you found produces certainty. Saying what is not included produces certainty. Saying what happens if something unexpected turns up produces a great deal of certainty, and almost nobody does it, because it feels like introducing a risk.

It is the opposite. The risk is already in their head. Naming it is what makes you the person who is not hiding it.

Which parts they will not pay attention to

Long explanations of your company. Your history, your size, your certifications, your awards. Some of that is worth a sentence and none of it is worth five minutes, because all of it is you talking about yourself and it cannot be verified from a kitchen table.

The exception is anything that answers the safety question with something checkable. How long you have been doing this, whether you are properly covered, and who exactly is going to turn up and whether they work for you. Those three are checkable and they get listened to. The rest is wallpaper.

> THE ONE-SENTENCE VERSION
>
> They cannot evaluate the work, so they are evaluating you, and they are doing it with a checklist made entirely of things you can control and mostly do not.

The honest limit of this idea

None of this makes an unnecessary job necessary, and it should not be read as a way to sell somebody something they do not need.

In fact it runs the other way, and this is worth being clear about because it will come up in nearly every chapter of this book. The behaviors that make

somebody feel safe with you are the same behaviors that make it very difficult to sell them something dishonest. You cannot show your evidence, say what is not included, name what might go wrong, and be consistent for ninety minutes while also overselling. The structure will not hold it.

That is not a moral argument. It is a practical one. The system in this book is difficult to use badly, which is most of why it works, and it is also why the people who run it well tend to sleep fine.

CARRY THIS

They are grading you on a checklist you could pass for free.