

Template Pricing

Think about the number of times you have written proposals over the last year. Did you write 20 or 200? How many were really different? In observing dealers' proposals I have found that a three ton changeout was really just a three ton changeout 90% of the time. Even though dealers wrote separate proposals for each changeout, the materials, labor and equipment costs were standard. The only variables on the proposals were the customers' name and the price. It's ridiculous and a waste of time to write down the exact same thing 90% of the time. What would really be more time and cost effective for us and our employees would be to template or flat rate our proposals.

We need to make up a standard sheet for all changeouts that lists customer information, billing information, proposal number, changeout description, special instructions, warranty provisions, customer approval and selling price. This document is actually a proposal with all pertinent

information, including price, for a specific changeout. Let's see how this procedure would work:

A Service Tech is in a customers' home and condemns an air conditioner. The tech knows its a 3-ton AC so he looks in his handbook and extracts a two page (front to back) 3-ton, AC changeout proposal. He reviews the proposal with the customer, especially specific "value" details and warranty information. The selling price, including tax, is included on the proposal sheet. Have two copies, each on standard 8 1/2" x 11" paper. If the customer accepts the proposal, the customer signs one copy that is brought back to the office and receives another copy as a receipt.

The tech calls the office, confirms the sale and receives installation instructions.

Templates should be two pages, front to back with 90% of all changeout scenarios. AC, AC plus furnace, heat pump, furnace only, etc. in 2-5 tons should be adequate. Place them in a book and make them easy to read and understand by both employee and

customer. Even sales reps could go to this type of proposal. It's ready to use and only needs the customers name and approval.

Whether you write all proposals by hand or have templates, minimize writing and pricing manipulations. Besides pricing changes are best left in the hands of sales reps because they are truly in the negotiating position. What is really needed by Service techs or other employees is simple, easy straight forward proposals.

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