

<b>Triage Call Notes</b> <b>TIME ZONE:</b> <b>DATE:</b> /    /		<b>Name:</b> <b>BUSINESS NAME:</b> <b>PARTNER/WIFE NAME:</b>	<b>Country:</b> <b>STATE:</b>
<b>1. FRAME CALL - INBOUND CALL</b> <b>Opener - Start Strong – Good flow, let them speak, don't fill the silence,</b>			
<p><b>Inbound:</b> Hi, am I speaking with _____?, it's _____ <b>Here from The Professional Builder.</b> I'm calling for our 10 minute call now about your building company.</p> <p>Cool -- I will definitely stick to time today because I have 3 calls straight after yours.</p> <p>My job today is really simple today. I'm going to ask you a bunch of questions to work out if or how we can help you. If we can't help I'll be the first to let you know and point you in the right direction. If I feel we can help, then the next step is to connect you with one of our advisors/specialists for a session on HOW that would exactly work.</p> <p>Make sense?</p> <p><b>Outbound:</b> Hi _____ It's _____ here from the Professional Builder; How are you?</p> <p>I was just giving you a quick call today as I saw your details pop up. And I wanted to see what was the reason you reached out and were looking for some help with your building company?</p> <p>&lt;qualify them on type of work, projects etc&gt;</p> <p>Ok well _____ it looks like from what you said you are in the right place, we help building company owners just like yourself - what I wanted to do was get a bit more into the nuts and bolts to see IF or HOW we can help.</p> <p>Did you have 15mins now to run through that or would it make sense to organise a time together later today / tomorrow?</p> <p>Ok great, So we can run through some questions now, Obviously _____ if I dont think this is a good fit for you i'll be the first to let you know and point you in the right direction. and if you are a good fit what we would do at the end is organise a time to run through the specifics on a zoom call with one of our advisors. Sound fair?</p>			
<b>2. PAIN DIG</b> <b>Ok so I read over the application you filled in, but I really want to hear it from you directly - why did you book this call today and reach out for some help with your business?</b>			
<b>3. QUALIFY:</b> <b>Ok so that I understand where things are at.. tell me a bit more about the specifics..</b> <b>Projects</b> <ul style="list-style-type: none"> <li>• What type of work do you do? is it New construction, renovations, remodelling...?</li> <li>• What's the average job size \$\$ wise?</li> <li>• How much forward work do you have in your pipeline? 6months, 12months? Where do these leads come from?</li> </ul> <b>Team</b> <ul style="list-style-type: none"> <li>• What kind of help do you have in the business? partner / spouse? Name?</li> <li>• And what's your role.. What hats are you wearing as the owner?</li> <li>• Are you still on the tools? Who is in your team right now to help you? Subbies? Foreman?</li> </ul> <b>Time</b> <ul style="list-style-type: none"> <li>• ## hours / weekends / nights?</li> <li>• Can I ask - what would happen if you took some time away from the business right? When did you take a vacation last?</li> </ul> <b>Margin</b> <ul style="list-style-type: none"> <li>• What are you pricing your jobs going into a project? Do you know what you are coming out of a project as gross profit margin?</li> <li>• Do you know your revenue was for the last 12months?</li> <li>• And what did you make as a net profit on that? What do you pay yourself as a salary?</li> <li>• What is your cashflow like? Are you in overdraft/debt?</li> </ul>			
<b>4. VISION</b> <b>Tell me, what would success look like to you in 12months time, both for yourself and the business?</b>			
<b>5. What do you feel is missing right now for you to achieve those goals? What is the biggest hurdle you face?</b>			
<b>6. We help people to.....</b> 1. Game Plan together for the next 12 months with clear 90 days actions and milestones, then our team help you to implement it 2. 3 areas..... a)Numbers/Pricing b)Team & Systems c)Sales & Marketing What's your priority... Or is it bits of each?			

## 7. SILVER BULLETS - Read back what they said

I've made some notes here and from what you have said it sounds like you are looking to...  
You dont have X, It's leading to **PAIN**, what you need Y so that you can **DESIRED GOAL**  
**Anything Else? Or do you feel like we are pretty on the same page here?**

## 8. URGENCY

What has been the catalyst to reach out for help?  
Why is that important for you now?

## 9. I've got 3 questions I ask everyone before we go to the next step

1. How coachable are you on a scale of 1 (don't listen to a thing) to 10 (open to new ideas)
2. How comfortable are you being held accountable each week?
3. Not going to sugar coat it.. this requires at least 5 hours of work a week to begin with .. How comfortable are you putting that time in?

## 10. PITCH CALL

### call to Action - Pitch Strategy Session - LIFT THE TONE AND OFFER A SOLUTION

Great, so the good news is it sounds like you are a great fit..

The next step from here would be to book a game plan session with CLOSER for you to go through the specifics of HOW that would work for your business.

In that session you would work out 3 key things together:

1. Where you want the business to be in 12months from now - so we know where we are heading
2. Next we can put together a step by step game plan with the right strategies to help you get there
3. Finally, We will plug some of your key numbers into our dashboard and identify how much time you can buy back and how much extra profit you can make by implementing these strategies.

Now if it looks like we are good fit, if it looks like we can work together we will get you underway on one of our programs. And if not we will point you in the right direction - It OK to yes lets rock and roll but equally its OK to say no this isnt for you. There is no obligation. Just give CLOSER a yes or no at the end session as to whether it's for you.

Sound fair?

Great, if that all makes sense I have the teams calendar in front of me, do you have your schedule there?

It looks like CLOSER has some times available this week, he will be a great fit for you as he has worked with building companies in the same position you are in.

Ok I can see 2 times, either.....AM or .....PM

What time are you able to make?

And CLOSER always asks as best practice to make sure anyone involved in the process and decision making in business is onboard.  
Is there anyone who is important to you that you would like have on the next session?

CLOSER will do the call over Zoom so you can meet face to face and run through everything, you just need to be in the office with a webcam, microphone..

Would that be a problem?

CLOSER always asks me to make sure you complete 2 key steps ahead of that next call:

1. The first is our **Builders Systems Audit**. This will show exactly where the opportunity is and benchmark your current systems against other building companies. It will also give you a custom report once completed and ANTONIO will review that ahead of your session. It typically takes 15minutes to complete - are you able to put aside some time to go through that audit?
2. Next CLOSER will want to review a copy of your current financial's ahead of the session to pinpoint any red flags and give you a side by side with one of our members numbers. Do you have these easily available/do you use xero/quickbooks? OK great so can you send a copy of the last 2-3 years, preferably side by side later today/tonight to give him some time to go through it properly?

I will send an email now confirming this time, connecting you with CLOSER and also providing the link to complete the System audit and details on getting those financials through.

So it's been great talking today I've got a page full of notes here to pass over to CLOSER so you guys can pick up where we left off.

But one more thing... Can I ask what are you **most looking forward to** with the next call?

## Silver Bullet Templates

**Margin:** Right now, you don't have clear visibility on your margins / your margins are just too low.

This is impacting your cashflow / the profitability on your projects

Which means it is hard to generate excess cashflow to invest into systems and build a team so that you can actually buy back your time..

You need to dial in these key numbers so that you have confidence to grow / invest and pay yourself what you are worth.

**Time:** From what you have told me it sounds like a lot of the business is still in your head /on your shoulders and you don't have clear processes onsite.

This is causing you to be pulled in to put out fires and micro manage your team / projects and meaning you are spending a lot of hours working IN the business

We need to look at some clear systems onsite so that you can push responsibility down and actually focus on the important levers on your business - as well as just really being able to take some time off with family / reduce stress / time for yourself

### Setter SOPS

#### Actions BEFORE a booked Triage in your calendar

Send SMS message 24 hours before confirming appointment:

**Hey XX . This is XX with The Professional Builder. I'll be reaching out from this number for our appointment to talk about your construction company. Shoot me a reply or thumbs up to confirm you are 100% serious about the time. 👍**

On positive reply from Client:

**Great, Check out the short video in this link before the call - it will answer some questions you might have:**

**<https://go.theprofessionalbuilder.com/complete-inside-look>**

Send

**looking forward to speaking with you then.**

#### Actions AFTER successful triage

1. Book into Closers Calendar
2. Send 'SS Booked' Email, Closer CC'd in
3. Send 'SS Booked' SMS 30mins after call
4. Complete task
5. Send Closer your triage notes via email
6. Follow Confirmation Process to get a completed systems audit

Send SMS message 30 mins after Booking SS:

**John, I have sent through the email now with the Systems audit to complete ahead of your call with CLOSER on DAY. Great to talk today and learn more about your business. Matthew**

Confirmation process and escalation

1. No response to email/SMS or systems audit completed within 72-48 hours of SS time. Bump email and send follow up SMS
  - a. Hey John, I wanted to make sure that email came through OK? (sometimes it can end up in spam)
2. No response to SMS/Email bump within 6-12hours - escalate to CLOSER to make a call and leave VM
3. No response within 12-24hours of booking try email, SMS and Calling again. Cancel or Reschedule.

## Confirmation Call Script

Hey NAME, Elmer here with the Professional Builder. How are you doing?

Great, hey look I was just giving you a really quick call. I was talking with Antonio regarding your scheduled game plan call tomorrow/Xday at TIME and he asked i just give you a call and confirm you are still 100% for that time together?

(reaffirm) Ok awesome so you will be able to be in front of a computer at TIME to run through everything?

And SPOUSE/PARTNER is all ok to join you for that call?

awesome, now I just see here it doesn't look like that Systems audit has come through at our end yet, did you get the email and link to that questionnaire?

Ok Antonio will definitely want to go through your completed one before your call so he can give you some insight into the areas of opportunity you have in the business.

When would you be able to complete that so he can review it?

(THEY SAY NO/CAN'T MAKE IT)

Ok so you can't make TIME/DATE? gotcha,

Well I really want you to get the most out of the call with Antonio for you and your business.

The best way to do that is to have enough time to review that system's audit and material I sent through so you guys can hit the ground running.

When would you be able to put some time aside to go through that?

<find suitable reschedule time>