

Project Discovery Sheet

STEP 1: Uncover Reason for Call – If Project Lead: “Great, do you have 3-5 minutes to answer some questions about yourself and the project you had in mind? First I’d like to record your contact information:

Prospect Name:		Date of Initial Contact:	
Street Address:		Phone Number: (Home, Office &/or Cell)	
City:		Best time to contact?	
State:		Email:	
Zip Code:		Type of Project:	
<i>(If calling back) Promised a Return Call By:</i>		<i>If Other, Specify:</i>	

STEP 2: [Salesperson's Name] will be calling you within the next 24-48 hours – usually much sooner. Now I would like to ask a few questions about how you found us and what you currently know about us:

Question:	Response or Action:
How did you hear about us?	
<i>If Referral or Other, Specify</i>	<i>Sent Referral Thank You Note?</i>
Visited our website yet?	<i>Give them website URL and invite them to visit.</i>
What do you know about our business?	<i>Based on answer – commit to educating them via website, sending an email or mailing them info.</i>

STEP 3: Salesperson Asks Prospect: Let’s talk for a minute about the Remodeling Process & Get into the project a bit:

Have you remodeled or built before? If Yes, How was the experience?	
Why do you want to have this work done? When would you like to have your project completed?	
How long have you lived in the home? How long do you plan on staying in the home?	
Tell me about the Project you had in mind? Ask lots of questions!	

STEP 4: If it is a desired lead, "Here is how we work:"

	Date/Time We Called Back	Date/Time/Location of Appointment
I’d like to set-up a time for our initial appointment. Is your's the only schedule we need to consider in scheduling an appointment?		

You'll be receiving an email from us containing a document titled: "**What to Expect at our First Meeting.**" Please read and review that before we meet. Look forward to seeing you on [Appt Date.] Thank you for your interest!