

Client Call - New Client Qualification

Initial Assessment

What area do you live in?

Is this for a residential or commercial property?

Identify their service needs:

- Lawn Maintenance
 - contract or
 - per time
- Garden Maintenance
 - contract or
 - per time
- Spring / Fall Clean-Up
- Design & Build
- Hardscaping
- Planting
- Mulch
- Sod / Seeding
- Irrigation
- Drainage / Stormwater
- Snow & Ice
 - contract or
 - per time
- Other (text field)

At this point if what they are looking for are services that you can provide, **collect client information and enter it into your EXT portal.**

- Client name
- Company Name (if applicable)
- Phone Number
- Email address

- Referral Source *always ask for this information so you can identify where your clients are coming from. In this way you can be more focused with your marketing efforts.

Maintenance Services- additional questions:

Know what requires an onsite visit with the client vs something that can be looked at through google maps or by having an estimator assess the property without the client present.

There are many different scenarios that can be present, here are just a few.

Offentimes **lawn mowing** itself does not need to have an onsite visit with the client. A good question to ask in this scenario is:

- When was the last time the lawn was mowed?
 - If it has been a significant time since the lawn has been mowed an onsite visit is required with or without the client present.
 - Also, ask what is their expectation once the work is completed?
 - Is the debris expected to be picked up and disposed of or left in place?
- Do they have a current provider and if so, why are they looking to switch?

Gardening typically needs an onsite visit with or without the client. Ask:

- When was the last time the garden was maintained and by who?
- Do you require or would like to meet with someone onsite?
- If they are switching companies, why are you looking to switch companies?

Based on the information you gather:

- Provide an estimate
- Assign an estimator to the task to create the estimate
- Schedule a meeting with the client and the estimator

Design and Installation Services - additional questions

Installation services have a great range - a mulch installation is much more straightforward compared to a complete landscape installation.

Do you have a budget range in mind?

- Yes No

Budget Range (if known):

How soon are you looking to move forward?

- ASAP
- 1-2 Weeks
- 1 Month+

Have you received other quotes?

Who is the primary decision maker?

Note: Know how your company responds to these requests. Many times there are onsite appointments needed. It is good to have an idea of what the client is looking for so you can help set up the expectation. For example the client may have an unrealistic timeline or ask for a service that you don't provide. You can help educate them on what your company can do and/or help with. Once you know more about what they are looking for you can help explain the process.

If everything aligns then you can proceed to set up an onsite meeting. Here are some key points for alignment:

Criteria	Yes	No
Service matches our core offerings	<input type="checkbox"/>	<input type="checkbox"/>
Property size fits our equipment & crew model	<input type="checkbox"/>	<input type="checkbox"/>
Budget aligns with service level	<input type="checkbox"/>	<input type="checkbox"/>
Timeline is realistic	<input type="checkbox"/>	<input type="checkbox"/>
Client expectations are reasonable	<input type="checkbox"/>	<input type="checkbox"/>

Customize questions for the variety of services that you offer. Here are some ideas for **Additional questions to consider for a variety of services:**

- Sod installation: when was the last time you sodded the lawn? What do you do for your regular/yearly maintenance?
- Mulch installation: does the garden require to be weeded prior to installation? Do you have a preference for mulch (or if your company recommends a specific type of mulch - clarify this with the client).
- Irrigation: So you take extended holidays during the spring/summer/fall season? Who was your irrigation system installed by? Do you have a map of the irrigation system?