



BUSINESS
MANAGEMENT
SOFTWARE

WIN MORE BUSINESS AND GROW PROFITS

EPISODE 2

Mark Bradley, CEO- LMN Software

 **FREE**
WEBINARS

DO YOU SELL WITH INTENTION TODAY?

- Who is your target customer?
- Geographical area?
- Types of services?
- Types of contracts?
- Sales Goals for each department
- Production Goals for each crew





SALES

Let's make a deal.

- Revenue target
- Pricing structure
- **Sales funnel**
- **Sales process**
- Contract Documents

LEAD

SALES FUNNEL

How do we get leads?

- Website
- Social media
- **Direct Mail**
- Referrals
- **Outbound Sales Effort**

SALES FUNNEL

How do we determine if a lead is worth pursuing?

- Location
- Work scope
- Contract type
- Client type



SALES FUNNEL

What does your company look for
when fact finding?

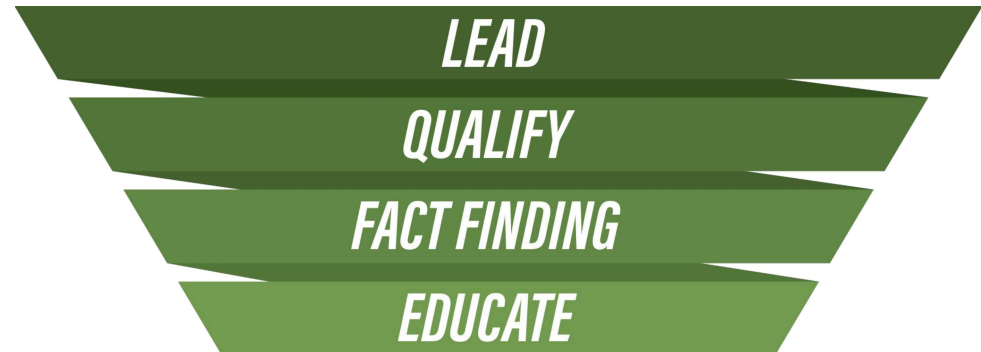
- Who
- What
- Where
- When
- Why



SALES FUNNEL

How do we educate our potential customers?

- Portfolio
- Quality of work
- Customer service
- Systems, processes & training



SALES FUNNEL

- Give the customer options
- Proposals should be flexible
- Itemized and more details

Installation – different stone grades, plant sizes/species, construction methods

Maintenance – per visit, seasonal, hourly, per application or a combination



SALES FUNNEL

What do we need to include in customer contracts?

- Exclusions
- Warranty details
- Work terms & conditions
- Payment terms & milestones
- Work terms & conditions



SALES FUNNEL

What helps you win a negotiation?

- Price (reduce or change scope)
- Financing
- Quality
- Uniqueness



SALES FUNNEL

- Forecast sales
- Stay on track
- Determine profit



SALES PROCESS



Do you have a documented sales process?



Can you write/sketch it in 30 seconds?



Are you sure you communicate value?

DIFFERENT STROKES....



RESIDENTIAL

- Marketing & Referral
- Fast turnaround
- Expansion/Enhancement
- Service focus
- Portfolio & Website
- Flexibility sells

COMMERCIAL

- Marketing & Outbound
- Pricing is high priority
- Qualifications
- Company References
- Portfolio & Website
- Multiple pricing methods
- Transparency in all areas

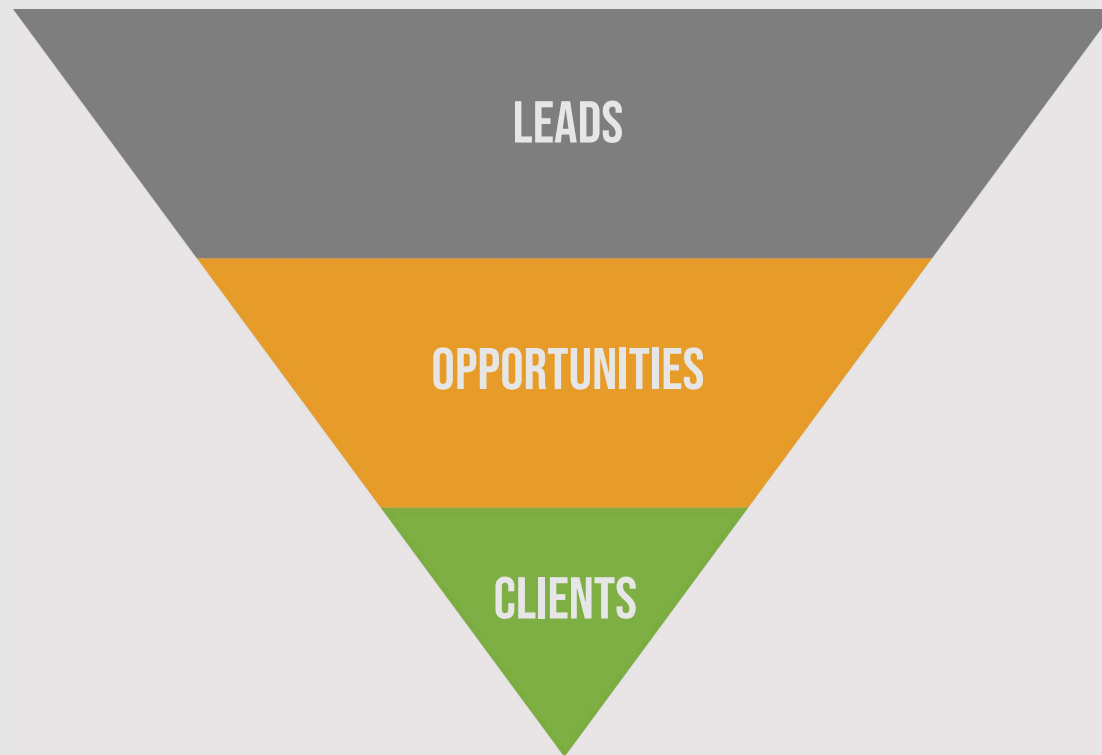
GOVERNMENT

- High Volume Estimates
- Price Driven decisions
- Bidders Experience
- Bonding & Insurance
- Transparency
- Service Verification
- Change Orders



**WHY SHOULD A
CLIENT CHOOSE
YOU?**

IS YOUR SALES PROCESS WORKING? BE HONEST!



UNIQUE SELLING PROPOSITION

- 1 Bigger, smaller, more personal?
- 2 Best-in-class service?
- 3 Fastest response time?
- 4 Higher quality?
- 5 Cheaper/cheapest?

*Is it really that unique? Aim for **uncommon**... be rare & hard to find.*

SALES DIFFERENTIATION

- Distinction – ask and LISTEN!
- Research in advance
- Ask the customer for the purchase criteria?
- Why did they chose the previous provider
- How was the previous experience?
- What will make the “winner” stand out
- Scarcity – Tell your STORY!
- Create an uncommon image and sales process
- Forget about being unique, aim to be uncommon
- Teach... be the expert
- Customers are looking for better... something uncommon

TYPICAL SALES MEETING FLOW



BETTER, UNCOMMON APPROACH

FACT FINDING

- Understanding the needs & wants
- Get the history in depth
- Why did they hire?
- What failed?
- Decision making process

EDUCATION & DIFFERENTIATION

- Approach
- Offering
- What is Unique & better?
- The salesperson trust
- The company trust
- The benefits, end result of the relationship

LOYALTY

- Discuss budget
- Optional pricing models
- Build a partnership
- Value engineering
- Long term benefits

FACT FINDING

Create conversation



Shows you care.



Tailors conversation to meet actual needs & form relationship.



Understand the contract history, ask the tough questions.

EDUCATION & DIFFERENTIATION

Be the expert



Explain what's going to be different/uncommon. Be prepared!



Every customer has desired result. Salesperson identifies what that is in the fact finding stage. Sell outcome by educating customer.



Share success stories... how you overcame this before.

CREATE LOYALTY

Before they become customers

- 1 **Help create buying criteria**
- 2 Customer-focused proposals
- 3 Plenty of options
- 4 Flexible business terms
- 5 Simple contracts
- 6 Follow up, be thankful



WE CAN HELP..... CUSTOMER RELATIONSHIP MANAGEMENT

- missed follow-ups for sales and service
- too many client meetings (evenings)
- customer service problems
- service turnaround is too slow
- customer info in too many places
- can't access info when you need it
- goals and accountability for salespeople & estimators
- improve the field/office communication gap
- identify best marketing spends, best salespeople
- accurate live reports to stay on track

CUSTOMER RELATIONSHIP MANAGEMENT

The screenshot displays the LMN CRM interface. On the left is a sidebar with navigation options: LMN Estimating, BUDGET, CRM (selected), Dashboard, Contacts, To-Dos, Tags, Referral Sources, Reports, ESTIMATE, ITEM CATALOG, FORMS, QUICKBOOKS, ACCOUNT, and GET HELP. The main content area is titled 'GRISWALD RESIDENCE' and includes tabs for Info, Contacts, Jobsites, Estimates, Communication History, To-Dos, and Files. The 'Info' tab is active, showing three summary cards: 'KEY DATES' (Last Contact: 47 days ago, Date Created: Dec 27 2018, Created By: Megan Mac), 'TOTAL ESTIMATES' (6 THIS YEAR, 7 ALL TIME), and 'TOTAL WORK' (a pie chart showing \$20,586.84 ESTIMATED and \$0.00 SOLD). Below these are two sections: 'GENERAL INFORMATION' and 'TRACKING + ASSIGNMENT'. 'GENERAL INFORMATION' contains fields for Name, Address 1, Address 2, City, State/Prov, Postal/Zip, Country, and Archived status. 'TRACKING + ASSIGNMENT' contains dropdowns for Type, Classification, Assigned To, and Referral, a text field for Ref. Note, and a TAGS section with an 'Add Tag' button and two existing tags: 'Installation' and 'Maintenance'. The LMN logo is in the bottom right corner.

LMN

LMN Estimating

BUDGET

CRM

Dashboard

Contacts

To-Dos

Tags

Referral Sources

Reports

ESTIMATE

ITEM CATALOG

FORMS

QUICKBOOKS

ACCOUNT

GET HELP

GRISWALD RESIDENCE

Info Contacts Jobsites Estimates Communication History To-Dos Files

KEY DATES

Last Contact 47 days ago
Date Created Dec 27 2018
Created By Megan Mac

TOTAL ESTIMATES

6 THIS YEAR 7 ALL TIME

TOTAL WORK

\$20,586.84 ESTIMATED
\$0.00 SOLD

GENERAL INFORMATION

Name Griswald Residence

Address 1 1634 Morris Lane

Address 2 Address Line 2

City Frisco

State/Prov Texas

Postal/Zip 75034

Country United States

Archived No

TRACKING + ASSIGNMENT

Type Client

Classification Residential

Assigned To Luke Briar

Referral Referral

Ref. Note Barb Smith (lives on the same street)

TAGS

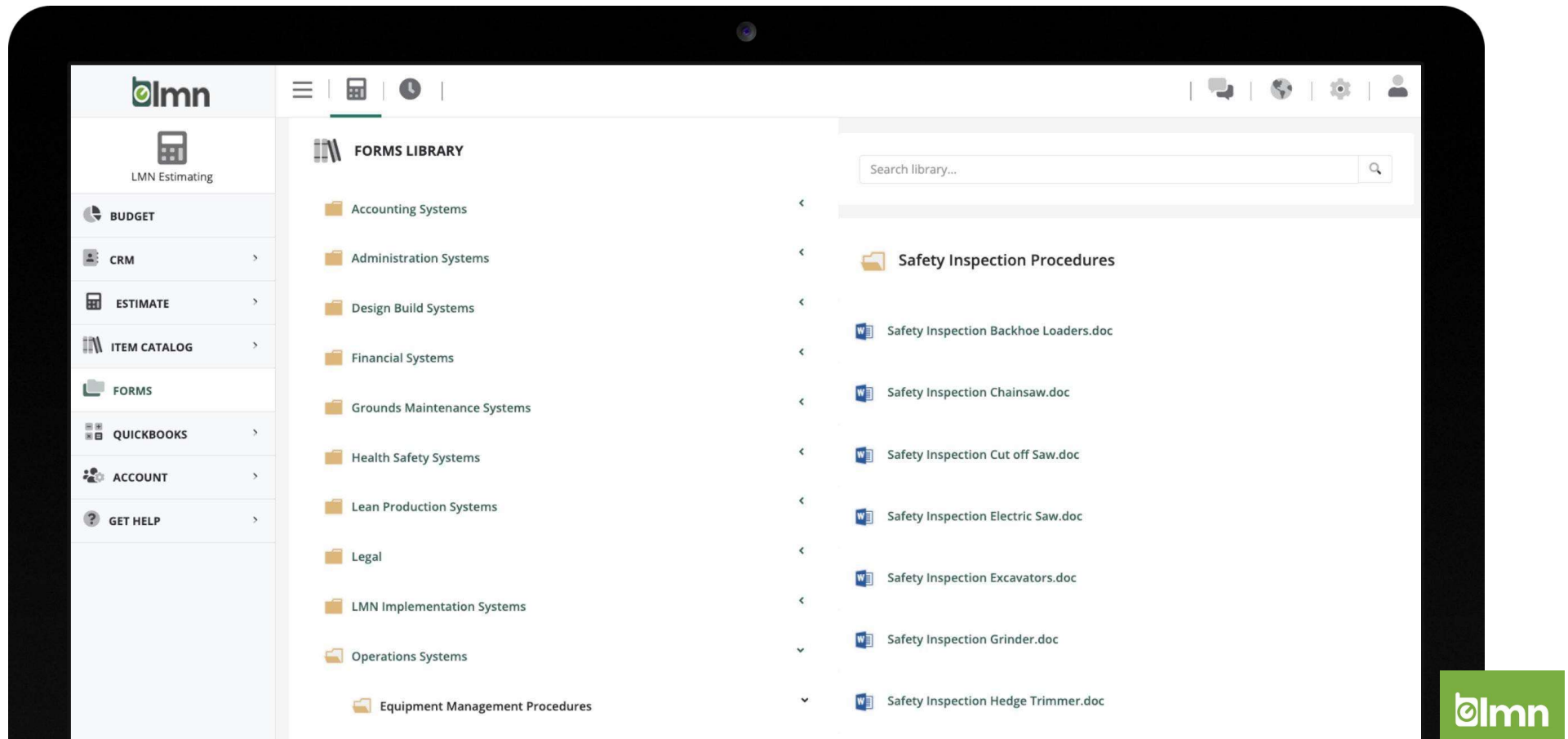
Add Type to add Tags Add Tag

Installation Maintenance

LMN

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THANK YOU

golmn.com/lmn-demo

**Join us for the next Webinar: Run Efficient Operations on
March 2, 11:30 am – 1 pm EST**