

# The 24-Hour Close.

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Win the job before your competitor even picks up the phone.

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## WHAT THIS IS

# The race.

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You and the other shop are running the same race. The customer wants a quote. Whoever gets a clean proposal in their hand first usually wins. This guide makes you the first.

You will not need to lower your price.

You will not need to throw in a free anything.

You will not need to chase the customer for a week.

You will need to send a clean proposal inside 24 hours of the site visit. Every time. No exceptions. The rest of this guide shows you how.

**THE PROMISE****Beat the other guy to the proposal. Win more jobs at full price.**

When you are first in the customer's hand with a clean, confident proposal, you do not need to be the cheapest. You just need to be the easiest yes. This guide makes you the easiest yes.

## THE DATA AND THE STORY

# The second guy loses.

When a homeowner gets two or three quotes, they almost always pick the first one that meets their need. Not the cheapest. The first one that meets their need.

Why? Because by the time the second proposal shows up, the customer has already started planning. They have a number in their head. They have a date in their head. Switching costs them effort. Effort is the enemy of a sale.

| FIRST PROPOSAL IN | WIN RATE   |
|-------------------|------------|
| Within 1 hour     | Around 50% |
| Within 24 hours   | Around 40% |
| Within 48 hours   | Around 25% |
| After 72 hours    | Under 10%  |

Speed is not just speed. Speed is a signal. It tells the customer you run a tight ship. It tells them you want the work. It tells them they can trust you to show up on the job day too. Slow proposals tell them the opposite.

## PART 1

# The Doctor's Estimate.

Doctors do not discount. They do not apologize for the price. They diagnose. They prescribe. They state the cost. You pay or you do not. That is the frame for every proposal you write from now on.

Most trade owners write proposals like a waiter. They list everything on the menu. They worry the customer will think it is too much. They drop the price before the customer even asks. That is why they lose at full price.

The Doctor's Estimate has four parts. Use them in order. Every time.

|          |                       |                                                                                                               |
|----------|-----------------------|---------------------------------------------------------------------------------------------------------------|
| <b>1</b> | <b>DIAGNOSE</b>       | State what is wrong in plain words. What broke. What is failing. What will happen if it is not fixed.         |
| <b>2</b> | <b>PRESCRIBE</b>      | State what needs to be done. The work. The parts. The time. Why this and not something cheaper.               |
| <b>3</b> | <b>STATE THE COST</b> | One number. No hedging. No 'around' or 'roughly.' Confident. The price is the price.                          |
| <b>4</b> | <b>SCHEDULE</b>       | Tell them when you can start. Tell them what they need to do to get on the schedule. Make it easy to say yes. |

## PART 2

# The proposal.

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One page. Eight sections. Plug in your numbers and send it. Inside 24 hours of every site visit. Every time.

You can build this in Word, in a CRM, or on a clipboard. It does not matter. What matters is that every part is filled in and the proposal goes out fast.

On the next page is the template. Copy it. Use it. Adjust the wording to your trade.

## ONE RULE

### **Send it inside 24 hours. Always.**

Not within a week. Not within three days. Inside 24 hours of the site visit. If you cannot do it yourself, get a virtual assistant or a junior team member to fill in the template. Your job is to walk the job and price it. Their job is to send the paper.

## PART 2 / TEMPLATE

# Copy this. Use this.

|                                |                                                                                                                               |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| <b>1. CUSTOMER</b>             | [Customer name]<br>[Address]<br>[Phone] / [Email]<br>Visit date: [date]<br>Proposal date: [date]<br>Valid for 30 days         |
| <b>2. DIAGNOSIS</b>            | Here is what we found at your home today. [Two or three plain sentences. What is wrong. What will happen if it is not fixed.] |
| <b>3. THE WORK</b>             | Here is what we will do to fix it. [Bullet list. Each item one short line. Parts. Labor. Time on site.]                       |
| <b>4. YOUR INVESTMENT</b>      | [Single price in bold. No 'starting at.' No 'approximately.' If there are options, list 2 or 3 max. Good. Better. Best.]      |
| <b>5. FINANCING</b>            | [If job is over \$1,500: 'This job qualifies for monthly payments as low as \$XX a month. Ask us how.']                       |
| <b>6. SCHEDULE</b>             | We can start your job on [date]. The work will take [X days]. Reserve your spot with a [\$X deposit / signed proposal].       |
| <b>7. WHAT WE COVER</b>        | [Workmanship warranty length. Parts warranty length. What we do if something goes wrong after the job.]                       |
| <b>8. ACCEPT THIS PROPOSAL</b> | Sign below and we put you on the schedule. Signature: _____ Date: _____<br>Deposit: \$_____                                   |

## PART 3

# Financing.

Financing is not a discount. It is not a beg. It is a way for the customer to say yes today. Use one of these three scripts based on job size.

## Job under \$1,500. Do not mention financing.

Small jobs do not need a payment plan. Mentioning one makes the job feel bigger than it is. Keep it simple. Customer pays at the end of the job. Done.

## Job between \$1,500 and \$5,000. Offer it as an option.

### YOU SAY

#### **Casual. Optional. No pressure.**

"Most of our customers pay cash or card. A few like to spread it over a few months. We can set you up with payments as low as \$XX a month if you would rather not pay it all at once. Let me know."

## Job over \$5,000. Lead with it.

### YOU SAY

#### **Lead with the monthly. State the full price second.**

"This job runs about \$XX a month with our standard financing. The total is \$X,XXX if you want to pay it up front. Most homeowners go with the monthly. Want me to send you the application?"

## PART 4

# The follow-up.

You sent the proposal. The clock is now running. Most owners stop here. That is why they lose the job to the slower competitor who just keeps calling.

Three touches. Day 1. Day 3. Day 7. After Day 7 you move them to a long-term list and let them go. Most close on Day 1 or Day 3.

| DAY | WHAT                               | WHY                                               |
|-----|------------------------------------|---------------------------------------------------|
| 1   | Confirm receipt. Answer questions. | Shows you are on top of it. Catches stalls early. |
| 3   | Add value. No pressure.            | Reminds them without nagging. Builds trust.       |
| 7   | Direct ask. Last touch.            | Forces a yes, no, or maybe so you can move on.    |

Next page has the scripts for each day. Word for word.

## PART 4 / SCRIPTS

# Three scripts. One sequence.

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## Day 1. Confirm the proposal landed.

TEXT OR CALL / 24 HOURS AFTER VISIT

**Short. Helpful. No ask.**

"Hi [name], just wanted to confirm you got the proposal we sent over. Take a look when you have a minute. Any questions, just text back or call me direct. I am here all week. Thanks again for having us out."

## Day 3. Add value, no pressure.

TEXT OR CALL / 3 DAYS AFTER PROPOSAL

**Helpful tidbit. Not a sales push.**

"Hi [name], wanted to share one thing about [the work] in case it helps you decide. [One specific piece of useful info. A photo of similar work. A warranty detail. A note about timing.] Let me know what questions you have."

## Day 7. Direct ask. Move on if no.

CALL / 7 DAYS AFTER PROPOSAL

**Force a yes, no, or maybe.**

"Hi [name], it has been a week so I wanted to check in. We have your spot open for [date] if you want to lock it in. If now is not the right time, no hard feelings. Just want to know if I should hold the date or free it up. What is your call?"

## PART 5

# The change order.

The job is sold. Then the scope changes. The customer wants one more thing. Or you find something behind the wall. This is where most owners give the extra work away for free. Stop doing that.

A change order is not paperwork to scare the customer. It is paperwork to protect both sides. They know what they are paying for. You know you will get paid.

Use this one-page template every time the scope changes. Even small ones.

|                        |                                                               |
|------------------------|---------------------------------------------------------------|
| <b>ORIGINAL JOB</b>    | Original proposal date: [date]<br>Original price: \$[amount]  |
| <b>WHAT CHANGED</b>    | [One or two plain sentences. The new work. Why it is needed.] |
| <b>NEW PRICE</b>       | Added work: \$[amount]<br>New job total: \$[amount]           |
| <b>NEW SCHEDULE</b>    | Original finish date: [date]<br>New finish date: [date]       |
| <b>SIGN TO APPROVE</b> | Customer: _____ Date: _____<br>Office: _____ Date: _____      |

**ONE RULE.** No change order signed, no work done. Including the extra fitting you found in the wall. Including the extra hour of labor.

## PART 6

# The DEAL call.

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This is how a real proposal call runs from start to finish. Four phases. Discover. Explain. Align. Lock. Names changed. Numbers real.

The owner is Mike. The customer is Linda. Linda called Mike on a Tuesday afternoon. Her water heater was making a noise. Mike walked the job on Wednesday morning. He sent the proposal Wednesday night. Linda signed Thursday morning.

|          |                 |                                                                                                         |
|----------|-----------------|---------------------------------------------------------------------------------------------------------|
| <b>D</b> | <b>DISCOVER</b> | Find out what is really wrong. Find out what they have tried. Find out what happens if they do nothing. |
| <b>E</b> | <b>EXPLAIN</b>  | Tell them what you found and what you would do. Plain words. No jargon. No technical lecture.           |
| <b>A</b> | <b>ALIGN</b>    | Make sure they agree this needs fixing now. Let them say the words. Do not say them for them.           |
| <b>L</b> | <b>LOCK</b>     | Ask for the schedule. Ask for the deposit. Walk through the proposal. Silence after the close.          |

## DEAL CALL / DISCOVER

**D**

## Find out what is really wrong.

**MIKE**

Hi Linda, thanks for having me out. Before I go look at the unit, can you tell me what brought you to call us today?

**LINDA**

It is making a banging sound. And the hot water runs out faster than it used to.

**MIKE**

How long has the banging been going on?

**LINDA**

Maybe two months. It got worse last week.

**MIKE**

Anything else I should know? Has anyone looked at it yet?

**LINDA**

Another company came by last month. They said I needed a whole new one. But they wanted \$4,500. I told them no.

**MIKE**

Got it. And if you wait another month or two on this, what do you think happens?

**LINDA**

Honestly, I am worried it will leak. My husband is on me about it. I just do not want to get ripped off.

**WHAT JUST HAPPENED****Quick read.**

Mike asked four questions and got the full picture. The other company. The price. The fear of a leak. The pressure at home. He did not pitch anything yet. He just learned. Now he knows exactly what to say next.

## DEAL CALL / EXPLAIN

**E**

## Tell them what you found.

**MIKE**

Linda, here is what I found. Your water heater is 14 years old. The banging is from sediment in the tank. That is what happens at this age. The unit is also leaking a small amount at the bottom seam. Hard to see, but it is there.

**LINDA**

So I do need a new one.

**MIKE**

I would not say you need one this week. But I would say within the next 60 days. If that seam goes, you have a flooded utility room. Not a small bill.

**LINDA**

What would you put in?

**MIKE**

Same size, 50 gallon. Standard tank. I would use the [brand] because that is what we install most and it has the longest warranty. Ten years on the tank.

**LINDA**

And how much?

**MIKE**

I will send you a written proposal tonight with the full number. It will be less than the \$4,500 the other company quoted you. I want you to see it in writing before we talk price.

**WHAT JUST HAPPENED****Quick read.**

Mike named the actual problem in plain words. He gave a real timeline. He held the price for the written proposal. Saying the number on the spot puts the customer in defense mode. Sending it after lets them read it without you in the room.

## DEAL CALL / ALIGN AND LOCK

# A + L

## Get the yes. Set the date.

## DAY AFTER PROPOSAL. MIKE CALLS.

MIKE

Hi Linda, got a minute? I want to walk through the proposal with you.

LINDA

I got it. The price is \$3,200. That is a lot.

MIKE

It is. Tell me what you were expecting it to be.

LINDA

I do not know. Maybe \$2,500.

MIKE

Fair. Two things. The \$3,200 includes the haul-away, the permit, and the ten-year warranty. The other company at \$4,500 did not include those. So you are actually saving \$1,300 compared to where you started.

LINDA

Okay. That makes sense.

MIKE

Linda, you told me yesterday you were worried about a leak. If that seam goes, what does that cost you?

LINDA

Probably a lot more. My husband would kill me.

MIKE

Right. So the real question is not whether to do it. It is when. I have Tuesday open or Thursday. Which works?

LINDA

Tuesday.

MIKE

Good. I will email you the confirmation right now. \$500 deposit holds the date.

## WHAT JUST HAPPENED

**Mike never sold. He aligned.**

He asked what she expected. He named the comparison. He had her say the cost of inaction out loud. Then he gave her two dates, not a yes or no. That is the lock. Two doors, both opening into the job.

## PART 7

# The 30-day install.

You have the template. You have the scripts. Now you install the habit. 30 days. Week by week. Most owners are closing 24 hours after the visit by Day 30.

Week 1: Set up. You build the template and the follow-up sequence.

Week 2: Send. Every visit gets a 24-hour proposal.

Week 3: Follow up. Every proposal gets the 3-touch sequence.

Week 4: Lock in. You track close rate. You adjust the proposal.

## ONE RULE

### Do not skip Week 1.

If you skip the set-up and try to wing the proposals from memory, you will send three good ones and then revert. The template is the spine. Build it once. Use it forever.

## WEEK 1 / DAYS 1 TO 7

# Set up.

Goal. Build the template and the sequence. Nothing goes out yet.

|                           |                                                                                                  |
|---------------------------|--------------------------------------------------------------------------------------------------|
| <b>DAY 1</b><br>MONDAY    | Read this whole guide. Print the proposal template on page 6.                                    |
| <b>DAY 2</b><br>TUESDAY   | Build your own version of the template in Word or your CRM. Fill in your name and warranty info. |
| <b>DAY 3</b><br>WEDNESDAY | Build the three financing scripts into a one-pager you can print and post in the truck.          |
| <b>DAY 4</b><br>THURSDAY  | Write the Day 1, Day 3, and Day 7 follow-up scripts into your phone or CRM as templates.         |
| <b>DAY 5</b><br>FRIDAY    | Print the one-page change order. Put a stack in every truck.                                     |
| <b>DAY 6-7</b><br>WEEKEND | Walk every tech and your office through the new system. Tell them this starts Monday.            |

## WEEK 2 / DAYS 8 TO 14

# Send.

Goal. Every site visit gets a proposal inside 24 hours. No exceptions.

|                             |                                                                                                |
|-----------------------------|------------------------------------------------------------------------------------------------|
| <b>DAY 8</b><br>MONDAY      | First site visit of the week. Walk the job. Take photos. Get the proposal out same day.        |
| <b>DAY 9</b><br>TUESDAY     | Track every site visit and the time the proposal went out. Write it on a notepad.              |
| <b>DAY 10</b><br>WEDNESDAY  | Any proposal that took more than 24 hours, write down why. Fix the reason.                     |
| <b>DAY 11</b><br>THURSDAY   | Use the Doctor's Estimate language. Diagnose. Prescribe. State the cost. Schedule.             |
| <b>DAY 12</b><br>FRIDAY     | Review every proposal that went out this week. Did each one have all 8 sections? Fix any gaps. |
| <b>DAY 13-14</b><br>WEEKEND | Check your close rate so far. Write the number down. This is your baseline.                    |

## WEEK 3 / DAYS 15 TO 21

# Follow up.

Goal. Every open proposal gets Day 1, Day 3, and Day 7 touches.

|                             |                                                                                           |
|-----------------------------|-------------------------------------------------------------------------------------------|
| <b>DAY 15</b><br>MONDAY     | Pull the list of every proposal you sent last week. Make sure each got the Day 1 confirm. |
| <b>DAY 16</b><br>TUESDAY    | Send the Day 3 add-value text to every proposal that hit Day 3 today.                     |
| <b>DAY 17</b><br>WEDNESDAY  | Call every proposal that hit Day 7. Use the direct ask script. Yes, no, or maybe.         |
| <b>DAY 18</b><br>THURSDAY   | Mark every proposal in your CRM. Won, lost, or follow up later. No more gray.             |
| <b>DAY 19</b><br>FRIDAY     | Time spent on follow-ups this week. Write it down. This is your install cost.             |
| <b>DAY 20-21</b><br>WEEKEND | Read the won proposals. Read the lost ones. What did the winners have in common?          |

## WEEK 4 / DAYS 22 TO 30

# Lock in.

Goal. Track close rate. Tighten the proposal. Make this how you work forever.

|                                |                                                                                     |
|--------------------------------|-------------------------------------------------------------------------------------|
| <b>DAY 22</b><br>MONDAY        | Compare this week's close rate to your Week 2 baseline. Write the gap down.         |
| <b>DAY 23</b><br>TUESDAY       | Adjust the proposal language if customers are stuck on any one section. Tighten it. |
| <b>DAY 24</b><br>WEDNESDAY     | Run a quick meeting. Walk the team through what is working and what is not.         |
| <b>DAY 25</b><br>THURSDAY      | Print the final proposal template. Laminate it. Put a copy in every truck.          |
| <b>DAY 26-27</b><br>FRI-SAT    | Have one team member shadow you on a proposal call. Walk through the DEAL phases.   |
| <b>DAY 28-30</b><br>FINAL DAYS | Track close rate for one more week. Write it down. That number is your new floor.   |

## PART 8

# Two ways forward.

You can do everything in this guide on your own. Many owners have. It works. It also takes time. Here is the honest side-by-side.

|                              | DO IT YOURSELF                    | DONE WITH EAC                                                                             |
|------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------|
| Time to install              | 30 days if you do every step      | 30 days. Same plan.                                                                       |
| Cost                         | Free. This guide.                 | \$1,000 up front. \$3,000 on day 31 only if you have 10 hours back. 14-day refund window. |
| Risk                         | You stop halfway. Most owners do. | Low. We hold you to the schedule.                                                         |
| The proposal template        | Generic. Build your own.          | Custom-fit to your trade and your team.                                                   |
| Weekly live session          | None.                             | 60 minutes a week with John and other owners.                                             |
| Direct access                | None.                             | Text John direct for the full 30 days.                                                    |
| Voice-Print of your business | Not included.                     | Built day one. Your team sounds like you on the phone.                                    |
| Founders 50 rate locked      | Not available.                    | Lifetime rate for the first 50 members.                                                   |

**WHO DIY IS RIGHT FOR.** You like to do it yourself. You have one hour a day for 30 days. You will not stop when it gets boring.

**WHO EAC IS RIGHT FOR.** You have tried before and stopped. You want someone watching the work. You want the close rate up this quarter, not next year.

## ONE LAST THING

# The fastest proposal usually wins.

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Not the cheapest. Not the prettiest. The fastest. Start being the fastest in your market on day 31.

Print the template. Print the scripts. Start sending proposals inside 24 hours.

Do it on your own with this guide. Or do it with us. Either way, do it.

## READY TO TALK?

## Book a 30-minute call.

We will look at your last 10 proposals together. No pitch. No pressure. If Win Back Your Week is a fit, we will say so. If not, we will tell you that too.

[winbackyourweek.com](https://winbackyourweek.com)

**John Reay**

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**We find the money your business  
is already making but not keeping.**

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[eliteadvisorsconsulting.com](http://eliteadvisorsconsulting.com)

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