



Quoting Sales Development

Keys to Success

Qualifying

- ✓ Qualify Leads
- ✓ Quantify Qualifications



Qualifying

✓ WHY?

✓ WHEN?

✓ WHO?



SPECS

✓ Closing Rhythm

Qualifying

Can you quantify a sales lead?



Qualifying

1. Why	10%
2. When	25%
3. Who's the Decision Maker	10%
4. Approval Process	10%
5. Budget	25%
6. Specs	10%
7. Closing Rhythm	<u>10%</u>
	<u><u>100%</u></u>

*Based on experience, not science



Qualifying

**Where could you input
this information?**

Qualifying

The SSO!

	Timing	Product	Stock/Quote #	Value	QTY	Com
Configuration	Jun-20	Tanker - SM - EXT AL - Inferno	10321	\$700,000.00	1	
ing Demo	Jun-20	Aerial - 107' RML - Inferno	H6469	\$900,000.00	1	40.00%
st Sale	Jun-20	Tanker - SM - MOD AL - FRT		\$535,000.00	1	0.00%
Collecting Info	Jun-20	Aerial - 100' MML - Inferno			1	0.00%
Demo Completed	Jun-20	Aerial - 100' MML - Inferno			1	40.00%
Demo Completed	Jun-20					100.00%
Awarded to FFA	Jun-20	Pumper - SM - EXT AL - Cinder		\$489,585.00	1	100.00%
Awarded to FFA	Jun-20	Tanker - SM - MOD AL - FRT		\$350,000.00	1	100.00%
Awarded to FFA	Jun-20	Pumper - MVP - EXT AL - Cinder	10122-0035	\$608,527.00	1	100.00%
nding Grant Approval	Jun-20	Tanker - SM - EXT AL - FRT	AFG	\$450,000.00	1	30.00%
ed to FFA	Jun-20	Pumper - TM - EXT AL - Cinder		\$500,000.00	1	100.00%
Info	Jun-20	Tanker - SM - EXT AL - FRT		\$340,000.00	1	45.00%
ing	Jun-20	Pumper - TM - EXT AL - Cinder		\$472,873.00	1	50.00%

Qualifying



Spec Request Form

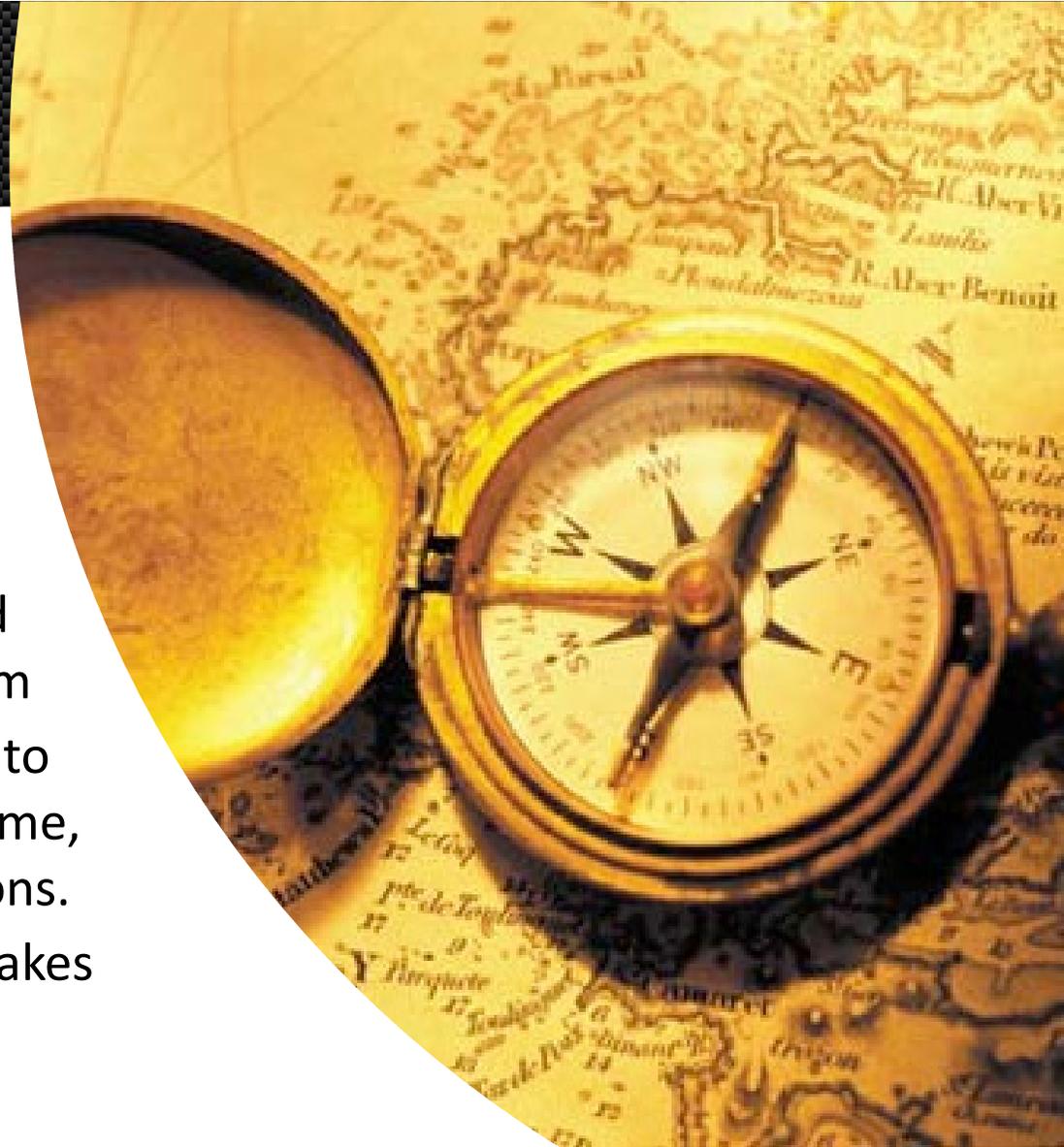
What if I told you...

Spec Request Form



Why use the Spec Request Form?

- ❖ It's laid out in the same order as Quote Writer
- ❖ It will que you on often overlooked items as you work through the form
- ❖ You will get the specification close to what they actually want the first time, rather than doing dozens of revisions.
- ❖ The form can eliminate costly mistakes



Spec Request Form

Checklist



When to use the Spec Request Form?

- ✓ Putting together an initial spec
- ✓ Reviewing a customers "Punch List"
- ✓ Reviewing a competitors bid spec

Spec Request Form



Date: 2/7/20

Initial Specification Request

Customer:			
Contact:		E-Mail:	
Phone:		Fax:	
Fire Chief:		E-Mail:	
Phone:		Fax:	
Address:		City:	
Purchasing:	SELECT	Quantity:	1
Order Date:			
Apparatus Type:	SELECT	Chassis:	Cinder
Cab Length:			
Flat Roof:	Flat Roof	Bumper:	Standard
Extension:			
Side:	SELECT	Air Horns:	Yes
Switches:	SELECT	Options:	DS Foc
Options:	SELECT		
1	Electronic Siren:	Whelen	Mechanical Siren:
	Switches:		SE
	Finish:	Standard	

How to use the Spec Request Form?

1. Fill Out Customer Information
2. Follow the drop boxes to add items and feature to build-up.
3. Add additional notes in the notes sections items for items not listed
4. The form is almost dummy proof

[Spec Request Forms](#)

Spec Request Form





Intro to Quote Writer

Intro to Quote Writer

FERRARA
REVGROUP

What you
need to know
before you get
started...



#1 Customer Info

- ✓ Buying Authorities Actual Name
- ✓ Their physical address
- ✓ Primary Contact
- ✓ Contact Information



#2 Apparatus Type

- ✓ Pumper, Tanker, Aerial, Etc.
- ✓ Custom or Commercial
- ✓ SM, TM, RM or No Pump
- ✓ Materials Preference



#3 Apparatus Details

- ✓ Ladder Location
- ✓ Engine Size
- ✓ Cab Size
- ✓ Wiring Preference
- ✓ 4x2 or 4x4



Intro to Quote Writer

Characteristics of a “Clean” QW File

- Long Spec, Header and Shop Note ALL the same verbiage
- Do NOT use the word “Match”, use the word “Reference”



Intro to Quote Writer

Let's Start a Quote!

Intro to Quote Writer



Changes Ahead!

FERRARA
REVGROUP



Pre-Con Protocols

Who Assigns Pre-Cons?



Mike Supal assigns all Pre-Con Dates and Administrators



Don't Call Glyn



Don't Call LaDonna



Don't Call Eric or Stevie

he Future

NEXT EXIT



Pre-Con Protocols



Shop Order Review
Print Review
Long Spec for Reference
Sign-Off



Pre-Con Protocols

Who needs to be present?



A “Decision Maker” needs to be present during the pre-construction conference



The same people present at Pre-Construction need to be present for Final Inspection



Additional Changes

Additional Changes Coming Soon!

- ❌ Not in SSO = No Factory Auth. Price
- ❌ Not in SSO = No SPQ Request
- ❌ Not in SSO = No Drawing Request
- ❌ SPQ Request BEFORE Drawing Request
- ❌ No SPQ and No Drawing = No Factory Auth. Price



Additional Changes



Additional Changes Coming Soon!

- ✓ Upfront Process Improvements
- ✓ Monthly Sessions (up to 12 people) for in depth Quote Writer Training

