

Pre-Move Survey Preparation – Part 1

Preparation and preplanning are key elements to success in any endeavor. This is especially true in sales. In this section, we will discuss the steps to take before leaving the office for our pre-move survey appointment. These steps will give us the best chance to close the order and more importantly, ensure customer satisfaction.

Survey Confirmation



This confirmation call may be made by the move coordinator but it is better if the moving consultant makes the call to confirm their own appointments.

Since the pre-move survey appointment may be booked days or even weeks in advance, we should always confirm the appointment with our customer. Some companies do this by issuing an automated e-mail that reminds the customer of the pre-move survey details. We believe that a telephone call is more personal and can lead to better results.

This confirmation call may be made by the move coordinator, but it is better if the

moving consultant makes the call to confirm their own appointments. Here are some reasons to make the confirmation call:

Schedules and circumstances may have changed since the appointment was made.

Moving is a hectic and stressful period. The customer's circumstances may have changed. It is better to make some accommodation in the schedule than to face a customer who is not prepared, is late for the appointment due to other priorities, or is distracted and not receptive due to external factors. This is how you might phrase the appointment confirmation call:

"Good evening. This is Juan Lopez of Active Movers. If you have a moment, I just wanted to confirm our appointment for tomorrow morning at 10 am. Is that still a convenient time for you to meet for the pre-move survey?"

Confirm the survey details.

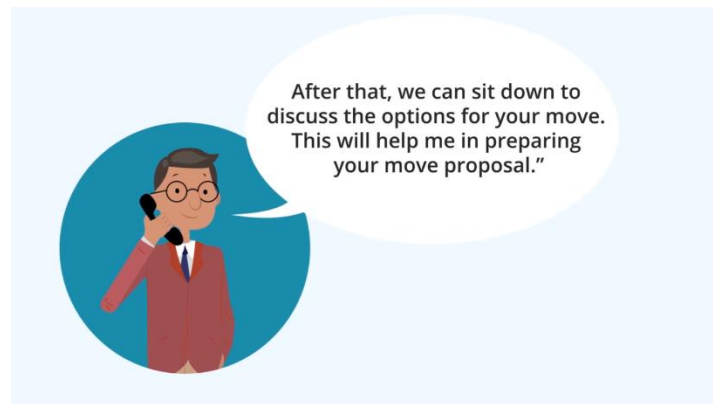
While our move coordinators will have carefully taken down address and other details, it is always a good idea to confirm. This will also establish that you are detail-oriented and will take the same care in making the arrangements for their move. The customer may also provide useful information such as elevator or security access information or a word of caution about the large dog that will greet you when you arrive. You might say:

"Mrs. Smith, I have your address as 15 Shady Lane, Unit 25 in the Langford area. It looks like there is good street parking in that area."

Then pause and allow the customer to offer a confirmation and perhaps some helpful information.

Confirm the survey sequence

"My notes show that you have a 2-bedroom home and you will be transporting all the furniture and contents to Rotterdam. The survey walk-through should take about 20 minutes. After that, we can sit down to discuss the options for your move. This will help me in preparing your move proposal."



Pause and allow the customer to understand the amount of time that you are asking them to set aside for the process. You will find that sometimes they have not done that, and this small step will avoid a rushed situation or an awkward knock at the door when your competition arrives for their pre-move survey appointment.

Preparing to be different

In the next section, we will be discussing the importance of differentiation. If a customer cannot distinguish your company, your service and your qualities from your competition, you have failed to differentiate. When that happens, the only differentiation becomes price and we wish to avoid that.

Let's apply the **Pareto Principle** to an aspect of differentiation. 80% of your competition will not prepare properly for the pre-move survey. 80% will grab the normal paperwork and rush out the door at the last moment hoping that traffic will not make them late for their appointment. As always, I'm not sure if the number is exactly 80% but you get my point, most of your competition will not be prepared.

Now, I see opportunity in that. If I take the time to go over a preparation checklist, I have an 80% chance of differentiating myself positively as a thoughtful, thorough professional with access to information that is valuable to the customer and who cared enough to take the time to prepare specifically for my customer.

Yes, it will take time but consider this. The normal pre-move survey will require about 1 to 2 hours of your time. Add preparation of the quote, presentation and follow-up and your investment of time starts to add up. In another section, we will discuss how much each competitive pre-move survey costs your company but for now, let's accept that it is a considerable investment for you and your company.

Now consider that if the customer is getting 3 competitive quotes for their move, you have a 1 in 3 chance of winning this move. Do you really want to invest all that time at those odds? This training course is all about upping those odds of winning but as it relates to preparation, does it make sense to invest 30 minutes to pre-plan and prepare? And if so, how do we do it? We will find out in the next section.