

Sales Process & Handover Mastery

Tighten your pipeline and protect your margin

If we doubled your leads tomorrow...

Would your business:

- A) Convert them smoothly
- B) Become chaotic
- C) Lose half of them

Most businesses don't have a lead problem. They have a process problem.

1	Leads	40	
2	Conversion	25%	
	Customers	10	
3	Average Job Value	\$ 4000	
4	# Transactions	1	
	Revenue	\$ 40,000	
5	Margin	25%	
	Profit	\$ 10,000	

Today we improve **conversion** and **handover**.

Handover → Better Customer Service → Increase # Transactions & Referrals

Handover → Less Mistakes → Better Margins

CONVERSION → Sales Process = Sales Pipeline

Retain → Customer Journey



Every stage should be visible and measurable.

PIPELINE LEAKS

- Slow response
- No follow-up
- Late quotes
- Confusion
- Poor handover

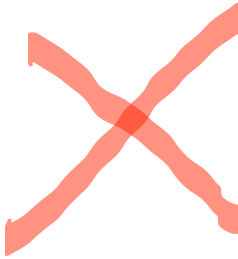
Poor communication

EXAMPLE PIPELINE

A

40 enquiries ↓ 30 site visits ↓ 25 quotes ↓ 10 wins	40 enquiries ↓ 25 site visits ↓ 20 quotes ↓ 16 wins
Conversion: 25%	Conversion: 40%

WHERE PROFIT IS LOST

SALES TEAM			DELIVERY												
<ul style="list-style-type: none"> • Enquiry • Contact • Site Visit • Quote • Follow Up 			<ul style="list-style-type: none"> • Unclear scope • Confused client • Confused team • Missing materials 												
<table border="1"> <thead> <tr> <th>STAGE</th> <th>OWNER</th> </tr> </thead> <tbody> <tr> <td>Enquiry</td> <td>Admin</td> </tr> <tr> <td>Site Visit</td> <td>Sales</td> </tr> <tr> <td>Quote</td> <td>Estimator</td> </tr> <tr> <td>Follow Up</td> <td>Sales</td> </tr> <tr> <td>Hand Over</td> <td>Project Manager</td> </tr> </tbody> </table>		STAGE	OWNER	Enquiry	Admin	Site Visit	Sales	Quote	Estimator	Follow Up	Sales	Hand Over	Project Manager	<ul style="list-style-type: none"> • Signed approval • Deposit received • Scope confirmed • Timeline agreed • Variations explained • Team briefed 	<ul style="list-style-type: none"> • Materials on time • % Hours to % Complete • Variations Completed • Timeline/deadlines • Call Backs • Job Margins / Back Costing • Client Experience
STAGE	OWNER														
Enquiry	Admin														
Site Visit	Sales														
Quote	Estimator														
Follow Up	Sales														
Hand Over	Project Manager														

Clear handover protects **profit and reputation.**

SALES WEEKLY KPI RHYTHM

Track weekly/monthly:

- Enquiries
- Quotes
- Jobs won
- Conversion rate
- Average job value

Clarity creates control.

OPERATIONS WEEKLY KPI RHYTHM

- Billable Hours
- Jobs on schedule
- Labour Hour variance

- Variations Captured
- Call Backs
- Average job duration
- Documentation
- Incidents / Accidents —

ACTIONS TODAY

Choose ONE improvement this week.

- 1 Define your pipeline stages → Sales Process - video 2,
→ Customer Journey (RETAIN)
- 2 Assign stage ownership
- 3 Introduce a handover checklist

Small improvements create big revenue gains.

TAKE AWAY

- Better pipeline
- Better delivery
- Better profit