Closeout Call

SAMPLE REPORT — fictional company, fictional salespeople, illustrative numbers

Lost-Estimate Pilot · Lone Oak Foundation Co.

25 completed homeowner interviews from unsold estimates, June–August · Prepared for the sales manager only

78 homeowners called	**25** completed interviews	**3** still deciding — handed back same day	**5 of 18** times "price" was really the reason

1. The headline

> Your sales sheets marked **"price"** on 18 of these 25 estimates. Homeowners named price as the main reason **5 times**. The bigger reasons were **pressure on the first visit**, **a decision-maker who wasn't there**, and **disagreement about the repair plan**.

2. What happened

Hired someone else	**13**
Postponed	**6**
Still deciding	**3**
Not doing it	**3**

How many companies came out: 3.4 on average
Median time to decide: 19 days
Financing mattered: 9 of 25

3. Why they didn't buy — main reason

Pressure / 'today only'	**6**
Price	**5**
Decision-maker absent	**4**
Financing	**3**
Scope disagreement	**3**
Speed / follow-up	**2**
Rep trust	**2**

4. By salesperson — shown only with 5+ interviews

Salesperson	Interviews	Top reasons lost	What homeowners said	Coaching focus
Marcus	9	Pressure (4), Price (2)	"*The price was only good if we signed that night. We didn't like that.*"	Drop same-day pricing on first visits
Dana	8	Decision-maker absent (3), Financing (2)	"*My husband wasn't there, and she didn't offer to come back.*"	Confirm both owners when booking; offer a second visit
Tyler	6	Scope disagreement (2), Price (2)	"*The other company said we needed 8 piers, not 14. Nobody explained why.*"	Explain the engineering behind pier counts in writing
Ray	2	Fewer than five interviews — no conclusions drawn		

5. By lead source

Source	Interviews	Main reason lost
Google and Local Services Ads	9	Pressure and price — shopping 4+ companies
TV and radio	6	Decision-maker absent
Home shows	5	Financing
Referrals	5	Timing — most postponed, not lost

6. By price band

Estimate	Interviews	What stood out
Under $8,000	7	Price and speed mattered most
$8,000–15,000	11	Pressure and financing
Over $15,000	7	Scope disagreement and decision-makers

7. Competitors homeowners chose

Competitor A (7 homeowners): a transferable lifetime warranty explained on the first visit, and fewer piers. **Competitor B** (4): no pressure — "they left the price good for 30 days." **Competitor C** (2): came out the same day.

8. Still live — already handed back

Homeowner	Estimate	Status
The Garcias	$11,400	**Still deciding** Waiting on a second opinion; open to a call
The Whitfields	$18,900	**Still deciding** Want the plan explained with both owners present
The Nguyens	$7,200	**Still deciding** Financing question never answered

9. Three things to change

> **1. Stop "today only" pricing on first visits.** Six homeowners chose a company that left the price open. "*We felt rushed, so we said no to everyone who pushed.*"

> **2. Confirm every decision-maker when booking.** Four losses came from a spouse or co-owner who wasn't there — mostly TV and radio leads.

> **3. Put the repair plan in writing.** When another company proposed fewer piers, homeowners assumed yours was padded. A one-page explanation of the engineering would answer it before they ask.

How this was done: homeowners were called on the company's behalf by a neutral interviewer who did not sell, negotiate or offer discounts. Recording only with consent. Homeowner details are deleted when the engagement ends. Every name and number in this sample is fictional.