Turn a good conversation into a stronger proposal

The owner’s answers should change what you put in the proposal. Use these ideas from Gabriel Eckert’s RCMA presentation to explain why the recommended work makes sense for that property.

1 Find out what the owner plans to do with the building.

Ask: "Do you expect to keep the property, sell it or change how it is used?"
Use the answer: Explain how the suitable roofing options fit that plan, including current spending and future maintenance costs.

2 Get specific about the owner’s biggest concern.

Ask: "What concerns you most about getting this work done?"
Use the answer: Address that concern in the proposal. If tenant disruption is the issue, explain the expected effect on access, scheduling and daily operations.

3 Learn how the expense gets approved.

Ask: "Who else will review this, and what will they need from us?"
Use the answer: Provide the technical, financial or tenant-impact information those people need. Ask about budget timing and other projects competing for funds.

4 Help the owner compare the choices.

Ask: "Which options are you considering, including waiting?"
Use the answer: Compare suitable options using initial and ongoing costs, disruption and risk. Explain the consequences of waiting based on the roof’s actual condition.

BEFORE YOU SEND THE PROPOSAL

Read it from the owner’s side of the table. Does it answer the concerns they raised? Can they see why you recommended this work and how it fits their plans? Keep technical suitability at the center of the recommendation.

Next: Help your contact take the recommendation through the approval process.

This document was developed to unlock additional value from Gabriel Eckert’s RCMA Fall Meeting presentation.
Prepared by Choice Roof Contractor Group / 360 Commercial Roofing to help turn industry insights into better conversations.

Help your contact get the roofing work approved

The person who meets with you may have to explain your recommendation to someone else. Make the follow-up useful by addressing what still needs to happen before the work can be approved.

1 **Find out what is still holding up the decision.**

Ask, **"What will ownership need to know before they can approve this?"** Their answer gives you something specific to address, rather than sending another message asking whether they have decided.

2 **Give your contact something they can forward.**

Summarize the problem, your recommendation, the cost and the effect on tenants. Include relevant photos or supporting details so your contact can explain the work without having to rewrite your proposal.

3 **Agree on the next step.**

Find out who needs to review the proposal and when. Offer to join that conversation or supply the missing information, then agree on when you will follow up.

EXAMPLE FOLLOW-UP / TENANT DISRUPTION

You mentioned that keeping the tenants operating is ownership's biggest concern. I've included a short explanation of how we would schedule the work and which areas could be affected, along with the proposal.

Would it help to go through that with you before you take it to ownership? I can also join the conversation to answer questions about the work.

ADDITIONAL RESOURCES

Scan for the sales and follow-up guide.

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