Confirmation Call Kit

Get every decision maker to the table before your rep shows up: the booking question, the confirmation call, the pre-appointment message, the day-of text, and a 10-minute prep checklist.

How you book today

- Who confirms: _____
- Booked ahead: _____
- What goes wrong most: _____

Your confirmation schedule

When	What	Who
At booking	Ask who decides (script A)	[Whoever books]
24 hours before (3+ days out only)	Confirmation call (script B)	[Who confirms]
24 hours before (3+ days out only)	Pre-appointment message from the rep (script C)	Rep
Morning of	Day-of text (script D)	[Who confirms]
30 minutes before	Rep prep checklist	Rep
Arrival	Doorstep check (script F)	Rep

The 3 rules

1. Every decision maker at the table, or move the appointment.
2. A real call beats an automatic text, because you can ask questions.
3. If they don't confirm by [noon] the day of, call once more. No answer: move it to the next day and give the slot to someone who's ready.

The plan, step by step

Start with the section that matches what goes wrong most for you (G for no-shows, H for “not ready”, E for a missing decision maker). Then use the rest in this order.

A. At booking: ask who decides (30 seconds)

"Great, you're set for [day] at [time]. One quick question so we don't waste your time: who else will be part of the decision on the [the project]?"

- If someone else: "Perfect. Can [name] be there too? The visit takes about [length], and it goes much better when everyone hears the same thing."
- If they say "Just me": "Great. Does anyone else need to see the price before you'd decide, like a spouse or partner?"
- Write the names in the booking notes.

B. Confirmation call, 24 hours before (2 minutes)

1. "Hi [First name], it's [Name] from [Company]. I'm calling to confirm your [the project] visit tomorrow at [time]. Does that still work?"
2. "And [Partner] will be there too, right?"
3. If yes: "Great. Plan on about [length]. It helps to have [anything useful: measurements, photos, old quotes, the area cleared]."
4. If the partner can't make it: use script E.
5. "Is there anything you want [Rep] to know before they come out?" Write it in the notes for the rep.
6. "See you tomorrow at [time]."

Voicemail: "Hi [First name], it's [Name] from [Company], confirming your [the project] visit tomorrow at [time]. Please call or text [phone] to confirm. Thanks."

Text after the voicemail: "Hi [First name], it's [Name] from [Company]. Just confirming tomorrow at [time] with you and [Partner]. Reply YES to confirm, or tell me a better time."

C. Pre-appointment message from the rep (send the day before, 30 seconds)

Voice memo or short phone video, recorded by the rep:

"Hi [First name] and [Partner], it's [Rep] from [Company]. I'm the one coming out tomorrow at [time]. Looking forward to meeting you both. Quick question so I come prepared: what's the number one thing you want to get out of the [the project]? Just text me back. See you tomorrow."

Text version: "Hi [First name], it's [Rep], the one coming out tomorrow at [time]. Looking forward to meeting you and [Partner]. What's the #1 thing you want out of the [the project]?"

D. Day-of text (morning)

"Good morning [First name], it's [Name] from [Company]. [Rep] will see you and [Partner] today at [time]. Reply YES to confirm."

- No reply by [noon]: call once (script B, steps 1 and 2).
- Still no answer: "Hi [First name], I didn't hear back, so I don't want to show up at a bad time. Want to move to tomorrow at [time] or [time]?" Then give today's slot to another appointment.

E. When a decision maker can't make it

"No problem. Since [Partner] is part of the decision, it usually works better to find a time when you can both be there, so nobody has to explain it secondhand. Would [day] at [time] or [day] at [time] work for both of you?"

- If they insist on keeping the time: "Okay, we'll keep it. Can [Partner] join by phone or video for the last 20 minutes, when we go over the price?"
- Write which one they picked in the rep's notes.

F. Rep prep checklist, 30 minutes before (10 to 15 minutes)

1. Read the booking notes: names, who decides, what they want.
2. Read any reply to the pre-appointment message.
3. Look at the property on a map: roof, windows, home age, neighborhood.
4. Write down the 3 questions you'll ask first.
5. Have the price sheet, payment options and photos of similar projects ready.
6. Text "On my way, see you at [time]" when you leave.
7. At the door: "Hi, I'm [Rep]. Is [Partner] here too?" If not, and they're not joining by phone: "Would you rather we find a time when you're both here?" Offer two times.

G. If no-shows are the problem (extra steps)

1. Book the next open time, not a week out, whenever the homeowner can do it.
2. Always send script D. Always call if no reply by [noon].
3. Ask at booking: "Is there anything that might make tomorrow tough?" Move it now if yes.

H. If "not ready" is the problem (extra steps)

On script B, add: "So you're ready to decide if it's a fit, it helps to have a rough idea of budget and timing. Have you and [Partner] talked about that?" If not: "No problem. [Rep] will walk you through options. Just know the price will be part of the visit."

Tracker (fill in each day)

Appointment	Who decides (names)	Confirmed by call?	Day-of text?	All decision makers there?	Moved?