



SAFER PROS

ACADEMY

PROFESSIONALS TRUSTED NATIONWIDE

SALES ACADEMY / FREE TWO-PAGE PRACTICE TOOL

The Homeowner Consultation Field Guide

A respectful structure for turning a first visit into a clear, comparable proposal and an informed customer decision.

01 Prepare before the visit

- Confirm the project address, decision participants, stated concern and desired time frame. Review photos or measurements already supplied; do not promise a price before understanding the scope.
- Bring a way to record requirements, proposed materials, exclusions, timeline and next action.

02 Diagnose with open questions

- “What prompted you to consider this project now?” “Which result matters most to you: appearance, durability, comfort, safety or timing?”
- “What have you tried already?” “Who else needs to review the options?” “What would make this project feel successful six months after completion?”

03 Confirm the scope

- Repeat the homeowner’s priorities in their own words. Walk the area together and identify access, surface preparation, hidden-condition risks, permits and site protection.
- Separate facts you can verify today from assumptions that need inspection. Offer options with clear tradeoffs and no pressure.

The consultation standard

The homeowner should be able to explain what is included, what is excluded, who does the work, what could change the price, and how the next decision will be made.



The Homeowner Consultation Field Guide

04 Present options transparently

- Provide a written estimate with work description, materials, price, estimated timing and payment milestones. Spell out any allowance or optional upgrade.
- Invite comparison on an equivalent scope. Do not imply a license, warranty or certification you have not confirmed.

05 Agree on a next step

- Ask “What would you still need to know to make a confident decision?” Send the promised proposal and agree on a date and method for follow-up.
- Document the answer; avoid repeated generic check-ins.

Homeowner’s desired outcome _____

Priority / budget / timing _____

Who decides / site constraints _____

Scope / prep / materials _____

Exclusions / risks / permits _____

Option A / Option B tradeoff _____

Question still open _____

Proposal due / follow-up date _____

Continue with the Academy

Explore the Home Improvement Sales Academy:
academy.saferpros.com/home-improvement-sales-academy/ • Call 1-800-HIRE-A-PRO
(1-800-447-3277) to discuss team training.

Further reading: FTC guidance on written estimates and contracts —
<https://consumer.ftc.gov/articles/how-avoid-home-improvement-scam>

© 2026 Safer Pros Academy. Free educational tool. Reproduction for internal team use is welcome with attribution. Local rules, contracts and licensing requirements vary. No outcome is guaranteed.