**Quoting like a Needs Analyst**

* HOW WE TURN RFQS TO WINS!

**Lesson 1: Introduction**

# **Welcome to this course!**

Salespersons can define quotation in different ways. Some define it as “a process to deliver a price to the customer”. At NCAB, we define quotation as “an opportunity to deserve the business”. This opportunity **includes** setting a price, but we will limit our opportunities if we focus just on the price.

Plenty of companies sell PCBs. We are an **integrated** PCB-Producer, and this means that we **add value** in the customer’s design/purchasing/production process in ways that our competitors cannot do. If customers don´t see or value this, they will just look at the price.

So, we have to show them that we add value.

In some other companies, a quote is just an answer to the question in the RFQ (RFQ = Request For Quote), with no added value. When customers receive quotes like that – of course they pick the supplier with the lowest price.

We don’t want to be in the race for the lowest price – it’s no fun, and if we are chosen, we can easily be replaced by anybody that is cheaper. So it´s not sustainable.

But, if we add some important value to the RFQ process, then the value outshines the competition’s offering.

At NCAB, our job is **not** just to answer the questions asked in the RFQ. We are **Need Analysts**, so our job is to figure out what **other** needs the customer has that we can find a solution for. Our job is to read between the lines and pick up the phone to identify the needs ***beyond* the RFQ**.

For sure, customers see quotes as a way to push down prices. But smart customers know how much grief, money, sleep and time it costs them to have a bad supplier, and if we can save them from all that, we not only deserve the order, we also deserve a better margin.

So, at NCAB, we are **Needs Analysts**. Our job is to HEED the NEED so that we can add value and make good business for both us and the customer. This is a course with advice to Needs Analysts. We will look at why you as a sales person are so important, and then we will dive in to the three lessons – validating RFQs, quote to win, and quote follow-up.

Welcome to this course on quoting like a Needs Analyst!

# **1.2 How important are you in this?**

At NCAB, customer relationships is at the heart of our business. You make sure that our customers’ NEEDs are HEEDed. When this goes well, you build strong relationships with customers so they give us business for years. When you sell more, our buying power towards factories gets stronger, which makes us more profitable. The gross margin you set pays for all our salaries and our future investments that makes us number 1. That’s a pretty important job you’ve got!

This means that your time is really valuable, so it is important that it is spent where the best opportunities are. Some RFQs are worth spending time on, others not.

You are in the best position to evaluate the risk and opportunity in the RFQs that come in.

* **The wrong RFQs** will not be worth your efforts – they should be politely declined.
* Some of **the right RFQs** will be routine – just give them the price.
* Some of **the right RFQs** will deserve some extra work – a good quote process will give us business for many years ahead.

By declining some RFQs, you give yourself more time to do a superb job on the quotes where the best opportunities are. Only a Needs Analyst can separate the wrong RFQs from the right ones and turn the right ones into good business. So, this is where your expertise is needed.

The criteria for the right or wrong RFQs will be a bit different between markets, but it should be possible for us, as a global company, to agree on some basic principles. A helpful rule-of-thumb is to validate the **customer** first, and then validate the **project** separately.

So, let’s move on to “Validating RFQs”.

**Lesson 2: Validating RFQs**

# **2.1 The right customers**

RFQs are the best! We live from them. They are a daily stepping stone before we can do what we really aim for – growing our business. Your time and efforts are valuable, and this course is about making sure that they are spent in the right place.

We get thousands of RFQs each month, and there are two major questions that will make all the difference:

1. **Is this the right *customer* for NCAB?**Do they appreciate the added value we can offer? Do we have a strong relationship?
2. **Is this the right *project* for NCAB?**Is there room for us to add value here? Can we build a stronger relationship on this project?

Understanding these two basic aspects makes things much more clear! To NCAB, the **right RFQ** is about the **right project** from the **right** **customer**.

Let’s look at customers first.

A **high *opportunity* customer** has great buying power (A+, A and B). Ideally, they value high quality, strong relationships and full responsibility, so they have demanding needs and are willing to pay for NCAB services.

Some customers seem like high opportunity, but when we do lots and lots of quotes and never win, maybe it’s time for a visit? Because we can’t keep putting in all that work with no business. Customers that focus too much on price will just cost us a lot of quoting hours but very little return.

I want to add one more tip. If they let us talk to their designers, that’s usually a good sign that they are interested in our competence, and not just using us to push down prices with their existing suppliers.

Also, pay extra attention with EMS customers. MS customers usually decide the PCB suppliers on about 50 -70% of their spend. The rest is requested by *their* customer, the ODM. And even if the EMS owns the decision, they usually have a preference of PCB supplier(s) matching their customers’ needs.

This means that it matters to us who their end customer is. If it is an un-demanding end customer, added values will carry less weight in the decision. If the end customer is demanding and maybe have a high cost on the bill of materials, the EMS will usually choose the “safest” PCB supplier – well, most likely us then!

So if you know you are bidding for an EMS, finding out who the end customer is should have a great impact on your actions going forward. Do you know the end customer? Maybe we should pay them a visit?

The right customers for NCAB have buying power and appreciate that we can add value. If the EMS is the customer, then we should know the end customer, because if it’s the right end customer, we know they will pay more the for higher quality and our services.

# **2.2 The right projects**

So, now we look at validating projects.

An “anonymous” quote is a **low opportunity** for NCAB. This is typically where we get an RFQ with artwork and batches, and we turn it around with a price, lead time and basic level of technical data on our quote. Nothing more added or communicated.
Another low opportunity is of course ***price-pressure-RFQs***, where they send their top 10–50 part numbers in for an RFQ, we squeeze margin and are still too expensive.

This is quoting with no needs analysis and no relation building in it. We just sent a price and a lead time – any PCB supplier could do that!
My experience is that if we send “anonymous” quotes to customers that we don’t really have a strong relationship with, we are 90% sure to lose it, meaning we can be 90% sure that we wasted our time and resources.

It is a **high *opportunity*** for us if we can find a twist or an opening in a project where we can ***ADD VALUE*** above the “anonymous” quote. Because that’s what a Needs Analyst does!

Most RFQs are full of openings where we can reduce cost and/or add value. Examples:

* If they ask for **standard lead time**: Maybe longer is OK? Maybe we can take it by train or something like that? Maybe shorter is actually more valuable for them?
* Same with **standard batch sizes**: Does it matter to them? If we can have a different batch size, maybe we can serve the customer in a better way?
* Is there an **end customer** that they are bidding to? What difference can we make for them?
* Can we suggest improvements in the panel design? Maybe **our technicians should talk with their technicians**?

Projects can also bring **high *opportunities*** later on, such as prototypes and quick-turn, where we get a chance to position ourselves for future business. And, of course, project size matters too.

When it comes to **risks**, we think about the customer, the factory, and ourselves:

* Will this somehow risk my relationship with this customer?
* Is this product design good? If not, what needs to happen?
* Is this the right project for the factory?
* Is the project reasonably safe in terms of product quality and performance?
* Can we make it within our PSL (Preferred Supplier List)? This is essential. It’s better to not quote if customers’ design can’t be discussed, than to quote – or even worse, take an order – that we can´t deliver on.

HEED the NEED!

# **2.3. Picking up the phone**

By talking to the customer, you get information and you also show interest, which in itself builds relationships. This gives us an opportunity to add both value and margin and differentiate ourselves!

Look at this e-mail*.* What questions would you want to ask her? Pause the video for a minute and write down your answers. Come on, just do it, I’ll wait right here.

These are some questions I would like to ask:

* Tell me more about the project itself?
* What can you tell me about your end customer?
* When do you need the quote?
* When do you expect the customer to take the decision?
* Besides the price, what can I do to help you win this project?
* I’d like to run it through with you, when would be a good time for me to contact you?

Having a good reason to call a customer is an opportunity for us, not a bother. It gives us a chance to uncover where we can add value, and this benefits both us and the customer.

To be continued…

# **2.4 The right RFQs**

Now let’s combine all this wisdom.

RFQs on the **right projects** from the **right customers** are where we want to spend our time and attention.

Under no circumstances do we send quotes to the wrong customers on the wrong projects.

Not even if the purchaser is your mother.

Those are easy ones. Now for the tougher decisions.

What if the wrong customer sends us an RFQ on a great project?

If they never bought anything and always blamed our prices? Well, if it’s a project where we can add some real value, and we can meet their techs and influence the design – maybe this is the time to show this customer that we make a difference.

What if the customer is right but the project is wrong?

If a good customer asks us for a quote, of course we often help them even if the project is not really right for us. But beware! We should never risk a good customer relationship by taking on projects that will make everyone unhappy in the end. A customer will be much more unhappy if we take an order and we can´t deliver, than if we say no to an RFQ.

So, to summarize – how to validate an RFQ:

* Is it the **right customer**? A+, A or B? Do we have a strong relationship, or do we believe we can build a strong relationship? Will this customer appreciate NCAB qualities?
* Is it the **right project**? Good design, within our PSL, makes business sense?

And finally: How can you make the most out of those quotes, meaning fewer quality problems, much added value to the customer and generate a healthy profit? Be creative!

**3. Quote to win**

# **3.1 Preparing for the quote**

By now, you have validated the RFQs, politely declined the wrong RFQs, and you’re ready to quote to win.

We have talked about not wanting to spend our time on doing anonymous quotes, where the customer just wants to compare prices from different suppliers – no real value added.

Does this mean that price will not matter at all?

Well, not quite! Price does make a difference – to a degree. The customer has to feel that they get value for money, or they won’t give us their business. The more value the customer **can see** that we add, the higher our price can be. But, we have to **show them** the value. This is where your professional touch comes in, as a Needs Analyst.

**Call the factory**

Sometimes it makes sense to contact the factory before writing a quote. These are three examples when I would call the factory:

* When area is **over 20 m2**, to negotiate prices et c.
* If it’s a **technically complex** PCB, DFM review, lead time, prices et c
* And certainly, if it’s a **large order** (over $2 000) to negotiate a price. If you call a factory and tell them you can place an order if they meet a certain rebate – let’s say 4,6% – they will be more likely will accept. *A tip!* Never ask for a rebate that is an even number, like a fixed 5% or 10% et c. Always ask for something like 5,2 or 10,6 – something that is a bit odd.

Lowering our costs is great, as long as we don’t pass all the gains on to the customer! Lower costs should ***always*** lead to higher margin.

# **3.2 Answers from Marissa**

This is how Marissa have answered my questions:

* **Tell me more about the project itself?**It’s a volume project for us. We have done industrialization on an earlier revision and now we quote to build 24 000 each year, but we need to build the 250pc sample run first in 4 weeks after order, so I would need those PCBs here in 3 weeks.
* **When would you need the first monthly volume?**The sample run will be scrutinized for about a week, and if OK they will release first volume order for production directly, expecting us to deliver in 6-8 weeks after that.
* **What can you tell me about your end customer?**The end customer is*Huge ODM Company Inc*. They do fail-safe remote controls for hydraulic cranes mounted on trucks. It’s a new customer for us, and we are competing against two other EMS. They are very picky both on quality and price, so we need the boards at the lowest price possible to win. They are also conscious about sustainability, as it is a vital part of their customers’ demands as it is for us.
* **What kind of liability in time or volume are you discussing with the customer?**

After the initial sample run, we plan for 2 000pc per month and aim to get liability for 3 months’ material needs.

* **Would you commit to the full yearly volume based on that we respect the 3 month liability?**Yes! If you keep maximum 3 months in stock and ship me 2000pc each month.
* **When do you need the quote?**
Our quote should be submitted in 5 days, so I need your quote in 2-3 days.
* **Besides “price”, what can I do to help you win this project?**Tough question, but we have looked at your sustainability report and I think anything that makes us look good in that department would help.
* **Thanks Marissa, I will have the quote with you in 2 days. I’d like to run it thru with you, when would be a good time for me to contact you?**
Afternoon in 2 days.

Aha! So now we know some interesting things:

* If they win the order, we will have orders for the rest of the year.
* Our negotiation point on our “cost” is vastly different from what she wrote.
* The end customer is mindful on quality and sustainability– perfect for us to show that we are professionals on that!

# **3.3 Writing the quote**

It is possible to take shortcuts in iQuote, so that we can set a price without entering all the information. This would be fine if we were just focusing on the price. But as you know, we don’t do that at NCAB! We want to set a price that the customer ***is prepared to pay***, not our cost + a mark up.

So, in Marissa’s case, I would look at the following points:

* Reduce our purchasing cost as much as possible by recommending larger panel size with more up, to help them win the order. That way we have orders for the rest of the year. But of course save some of the cost saving for ourselves and give us a healthy gross margin!
* Check if we have quoted them before, and what their price was that time
* Check what relationship we have had with their end customer. Have we quoted (and won) any of their EMS before?
* Respect the lead times they need on initial batches and then revert to sea or train as a sustainable freight method.

So, this is how I would do the quote for Marissa:

* So let’s walk intro iQuote, where all the basic data is.
On the next side here, I’ve utilized the comment fields. Down here, will be comments that are on the actual quote we send to the customer. And the point of course is that if we are one out of eight others that send in a quote with price, the customer will look at the price first and anything else after. But I like that we make quotes that point out good things that the customer can enjoy using us as a supplier.
* So, let’s see on the actual paper. I’m making my quote more than just a lead time and a price. I want to put in other factors for the customer to evaluate.
* Also on the technical part, I make sure that I have filled in all relevant data. In this case, the artwork demanded mid-Tg, great – I have noticed that and included that. It’s also a cost driver.
* The customer let us do our own panel – I mark 6up. And in this case it’s better efficiency that 4up.

iQuote is a great tool, but in the end, it’s all about the professional touch. **You** know the relationship and added value – that can be worth 30% to 80% gross margin. Here I also want to remind you of the course ‘**We are all race car drivers**’, where Hans [Ståhl, previous CEO NCAB Group] talks about gross margin.

# **Highlighting the added value**

So, we have validated the RFQ, and found some interesting openings, we have called the factory to get better prices and talk about the panel and utilization, and we have made full use of iQuote. Are we done now?

Not quite! For the customer to realize what kind of value we are adding here, we should ***point it out***. Purchasers read a lot of quotes, so they quickly skim though them. If you want your customer to notice something, you should ***highlight*** it.

A simple highlight colour is actually very effective in pointing out things that are special about the quote.

* You can see I highlighted the freight, in this case train, and I actually calculated the carbon footprint difference compared to air [can be found in the 2019 Sustainability Report, page 24].
* I also point out that we have already agreed with the factory to have a prioritization for her first run.
* I also put in a larger panel size to reduce cost and waste. And as it reduces waste, it also has an effect on the carbon footprint.

So, this is basically what I will send to Marissa and then follow up on. C’mon Marissa, do the right thing now!

**Lesson 4: Quote follow-up**

# **4.1 Introduction**

Quotes, let’s win them!

In this course, we will cover what we should do after we send a quote to a customer to maximize the chance of winning the order.

In NCAB group, we quote over a 100 000 times a year. So we spend roughly 50 000 hours in producing quotes – that’s more than 300 hours per salesperson in this company. That’s a lot of work, and it’s actually cost, and we don’t want to waste that. We want to win business, so we are successful.

Following up quotes is all about building relations and understand if our offer fits the customer needs, or if not, what do we need to do to make the offer fit? The author Michelle Moore said “Not following up on your prospects is the same as filling up your bathtub without first putting in the stopper in the drain” and that’s a good point. So if we invest into do a quote, we should follow up on it – simple logic.

Well, I don’t expect actually that we’ll follow up everything, the minimum requirement is that we follow up all quotes that have value over 1 000 dollars, plus any prototype and any quick-turnaround quote.

Following up shows customers also that we take Full Responsibility and that we want to build Strong Relationships. It’s in our DNA as it is in our values.

It is important to understand that our primary job is not actually doing quotes; our job is to win business. The process of quoting is just a very important step in growing our business.

Remember, we can’t win all the orders all the time. But it’s our job to make sure that there’s always a next step. And an agreement is a win, because it brings us closer to the orders now and in the future.

Following up will give us happier customers, probably the order and an even better chance on winning the next opportunity as well.

# **4.2 Changing the perspective**

Think of yourself as a customer. You work as purchaser at a company that builds remote controls for hydraulic cranes. You’re really stressed, the project is late, and you can’t sleep because the quality has been terrible with your current PCB supplier, and you desperately need help to get new PCBs as soon as possible. You are doing several projects at the same time, and for this project you have actually sent our RFQs to ten different suppliers.

One supplier calls you. Which of these questions would you like them to ask you?
1. Have you had time to look at my quote? What did you think about the price?
or
2. How is it going with your remote control project? We are ready to get your PCBs into production on Friday. Shall I call the factory and pursue the order?

There’s a huge difference, and to make that difference you need to understand the situation.

Remember that we are needs analysts. We want to HELP the customer to solve their needs – not really give them a quote. Customers are usually not interested in the quote per se – they are interested in solving a problem.

To call and only ask about a quote or a price shows that
a) we focus on us, and
b) the terms are up for discussion.

By showing interest in the customer’s project or their business, and showing initiatives to help the customer, eliminates an initial discussion about price that might not even be the most important part.

# **4.3 Priorities**

In the beginning of this course, I talked about that if we invest in doing a quote, we should also follow them up. So remember, we’re not doing quotes just to do quotes, we do them to win business.

There is local strategy on quote follow up, so please adhere to that. I don’t expect actually that we follow up everything. But there are a base level, and I put in three different quote types:
1. Prototypes
2. Quick-turn
3. Any quote with a value over 1 000 dollars
…and this is why:
**Prototypes** will give us new part numbers that we can create profit from.
**Quick-turn**, because if we can serve customers with good quick turns, that will build trust.
And **order value above 1 000 dollars** because we cannot follow up everything, so if we put out effort in to follow up, it should be done on quotes that have a decent value.

Again, you might have local strategies which are more follow-ups than this, and that’s perfect. Me personally, I would definitely follow up on any new customer quotes, etc. so where I try to build an extra-strong relationship with the customer I just acquired.

So let’s look into how you can get a good overview on your existing quotes, let’s dive into SuperOffice.

# **4.4 ABC in Quote follow-up**

There is a saying in sales that you have probably heard of – ABC. It means **Always Be Closing**.

Here at NCAB, closing, in this case, means that you **make sure that there is a next step**. So closing here does not always mean that we get the order, but it does mean that we are in an **agreement** with the customer on a next step and what that is.

Typically, a next step can be a date for the next call, confirmation on a meeting, agreement to send information, etc. A tip is to surf on success. If you get the business, what else can we support with, and when can we support with that?

If the customer says “I will call you when I know more”, that’s not ABC. The ABC should always be in our hands, meaning that we are doing the next activity. Closing means that we should have the customer’s agreement to call back, and having that agreement makes it so much easier to start the next conversation.

Asking for agreement shows the customer that we take Full Responsibility, and that we want to build Strong Relationships. We live our values.

Sometimes we do lose an order, but in that case, closing can be an agreement on the next project, so we are in the game of possibly winning the next opportunity. So we can’t win all the orders all the time, but it’s our job to make sure that there is always a next step. Either on a coming project or with a person or on a company level. So don’t limit yourself by only talking about projects – what’s the next big thing we can do for you as a customer, person or company? And the agreement is a win because it brings us closer to the orders now and in the future.

So at the end of every call or customer visit you make, make sure you got further steps accepted and agreed on and deliver on them. A tip is to always have a short and long-term commitment with the customer. A short-term is a next step in the project or the next meeting. A long-term can be a seminar in six months, or something that happens further down the line.

ABC, Always Be Closing.

# **4.5 Open questions in Quote follow-up**

To HEED the NEED we of course need to have information from customers. So we need to ask the right questions that lead the customer to express their thoughts and give us information.
Being skilled in questioning is helpful in a needs analysis so let’s dig in to it.

A **closed** question typically gives a one-word answer – Yes or No – which doesn’t give us much information.
**Open** questions typically give much more information, and there is a potential for further discussions and questions,and information about customers situation which can lead us to more opportunities.

These are examples of ***closed*** questions.
– Did the quote meet your expectation?
– No
– Oh, that was not good, was it the lead time what was the problem?
– No
– OK, did I miss anything technically?
– Yes
– So was it wrong panel design?
– No

So, we can go on like this forever. This is of course a bit of overplaying, in reality they will give some info but as you can see, they will give you a precise answer, but not much information. So, it doesn’t really invite the customer to speak.

***Open*** questions encourage the customer to talk about their needs, and they generate a lot of information much faster.
Open questions typically start with where, who, how, what, when and why.
– So what’s your situation on this quote?
– Well, it´s halted
– OK, how come?
– Our customer have EMC problems with the prototypes and need to redesign
– OK, we can actually be helpful as our techs can support in good stack up suggestions, who should they talk to?
– Aha, I do not know customers technical person but from our side it’s Mary Hopkins that lead the technical discussions with the customers.

As you see, open questions will lead to much more information and can drive the conversation forward in a good way.

A good thing to remember, is that closed questions make customers reply on what’s on ***your*** mind. Open questions make customers talk about what’s on ***their*** mind.

Closed questions are useful, especially for **confirmation**, to check if we understood correctly, or to get a **commitment**.

A good way to work with open and closed questions is to mix them; so open question, followed by a closed question, followed by an open question. Let’s have an example.
– What needs to happen for you to give me the order?
– I need you to shorten the lead time with four days
– So if I meet your lead time target, will you give me the order then?
– Yes!
– Perfect! When can you issue the order?
– Tomorrow at lunch

So by constructing a closed question you can actually get a very strong confirmation from the customer. “So, have we now agreed that if I meet your four days shorter lead time, you will actually give me the order?” The answer will be “Yes”.

# **4.7 Strategic reporting**

All quotes is, of course, registered in SuperOffice. And when we do a follow-up, we, of course, need to update SuperOffice on that quote.

The clever thing with this is that we can keep track of which customers are buying, which are not buying, where do we need to go visit the customers and maybe have a discussion if our hit-rate is low etc. All these strategical points of information are **only available if we put in the information**. So, therefore, we shall put in all this information on all our quotes and quote follow-ups.

The great part with that is, that you can have a track of all your quote follow-ups; there you can find all your open quotes and all your won quotes, etc.

We can also extract that information on a country level, on region level, as well as on a global level, and that’s the information we’re going to use as a part of strategies going forward.

So when you put your quote follow-up together with the type of customers, together with the type of offerings were making, etc., we can actually help you being more successful by doing good strategies.

We have NCAB offices almost all over the world, and different markets have different maturity, meaning that we need to be able to be flexible in meeting those new customers’ demands.

So I hope now it’s clear that we need to put the information back in the CRM, it’s good for you, it’s good for your country, and it’s good for NCAB.

Let me show how you do quote follow-up in SuperOffice.

**Outro**

So, it’s time to round this off.

Nobody is hired in NCAB to “do quotes” as an objective. We are all here to add value.
The quoting is a given step; it’s hard to add value if we don’t win the order, but we do not want anybody to just be a quoting machine.

A quoting machine is someone who believes the job is to mechanically produce a quote for every RFQ that comes in. For a quoting machine, it’s very hard to find time to put in some extra effort into winning important customers and projects.

The opposite, like here at NCAB, is being a needs analyst, picking the right customers, researching their needs, and finding out how to add value beyond the RFQ.
So, think about the whole course as an “add value” course.

To summarize it, let me point out some differences between the thinking of quote-machines compared to needs-analysts.

*Quote machine*: “I have 15 RFQs. That means 15 quotes to do before I can go home today. That’s 6 minutes per quote. Let’s go.”
This is not a good approach. What you want to do is start with thinking: “Where should I put in extra effort? Where can we add value?“
The key to winning more business is to validate RFQs and, quite often, politely say no.

*Quote machine*: “ This the 72nd quote I do for this customer and I've never won. This time I’ll take down the gross margin and see if that helps. It’s not my fault.”
Now here, you want to call the customer and ask what their situation is and what’s actually needed. “If I meet these objectives… will I win the order?”
The key to winning more business is to understand which customers appreciate NCAB’s qualities.

*Quote machine*: “An RFQ is a list of questions and my job is to answer them. Correctly.”
To us needs-analysts, an RFQ is a starting point that shows what the customer is aware that they need. Our job is to figure out what other needs they have that we can help them with. This means calling the customer and asking about their project’s challenges and opportunities.
The key to winning more business is to take the opportunity to show the customer how we can add value, specifically for them.

*Quote machine*: “Costs are what they are. Just accept it and add mark-up. I can do that.”
To us needs-analysts, costs can be pushed down for features that don’t matter to the customer. Understanding customer needs means knowing which costs to add on because they benefit the customer.
The key to winning more business is to set the price by understanding the value we deliver. “Which impact will this have on the customer’s business? How can I make that obvious to them?”

*Quote machine*: “The customer said ‘no thanks’ to our quote. This is the end. Aaahrghhh!”
A “no thanks” from a customer means that it is now time to take the next step. “So, what projects do you have coming up next?”
The key to winning the next job is to keep offering value to the right customers.
Remember the lesson from Ryan’s Warm Calling course – most customers buy at the 5th-12th contact.

If you ever feel like a quoting machine, take a pause and reflect…am I adding value right now or just sending another anonymous quote?

Remember:

* You can make a huge difference by just talking to a customer.
* You are surrounded by a team of colleagues that can make a difference if you ask them for help.

So, go out there and quote like a needs-analyst! It’s more interesting, it makes customers happier, and it drives the success of NCAB.

Good luck and thank you for taking this course.