

The First Trade Client

The Chapter 15 demonstration engagement, from first message to signed monthly tier.

Chapter 15 argues that the fastest route into this specialty is not a pitch but a demonstration: one finished job, rebuilt properly, handed back to the owner as a single page he has never seen before. The chapter makes the case. This guide walks the engagement itself, in order, with the words you can use at each step.

It takes about four hours of your time spread across two weeks. Run it once and you will have a construction client, a close-out report you can show the next prospect, and the only thing that reliably ends the credibility question: evidence.

Step one — choose the job, not the client

Ask for a *finished* job, not an open one. A finished job has every cost in, no arguments left about scope, and a number at the end that cannot move. An open job invites debate about what is still to come, and debate is the enemy of a demonstration.

Ask for one that is recent enough that the owner still remembers it, and ordinary enough that it represents his usual work. The job he already knows went badly is the wrong choice — he will credit the result to the job, not to your method.

The ask, by message or at the counter:

"Give me one job you finished in the last few months — nothing special, just a normal one. I'll rebuild its costs properly and show you exactly what it made. Half an hour to walk you through it, and you keep the page either way."

Step two — collect, and set the boundary while you do it

You need four things: the quote or estimate broken into categories; every supplier invoice and delivery ticket touching the job; timesheets or an honest reconstruction of hours, the owner's included; and every subcontractor invoice. Ask for all four at once, in a single list, and give a date you will come back by.

Two sentences are worth saying before the paperwork arrives, because they set the shape of everything afterwards.

WHAT TO SAY AT THE START

"Two things, so there are no surprises. First, this is a management view of one job — it is not an accounting policy and it does not change your financial statements or your tax position. Anything that touches those goes to your accountant."

"Second, I am going to cost your own hours at a rate we agree. Most owners have never done that, and it is usually where the surprise lives. I would rather tell you now than halfway through the meeting."

Step three — rebuild the job

Apply Chapter 5 to a single file. Five cost codes: materials, labor, subcontractors, equipment and plant, other direct. Every document gets two tags — what it is, and which job it belongs to. Where a receipt covers two jobs, split it on the owner's best estimate and move on; an imperfect split beats an untagged lump, and nothing in this exercise turns on the last forty dollars.

Cost the owner's hours at the agreed internal rate. Note on the page that this is a management-reporting convention, not a payroll entry, and that it should be confirmed with his accountant before it goes anywhere near a financial statement.

Then fill in the Job Close-Out Report. Estimated against actual, line by line, with a variance column and one short sentence per line saying what the variance was.

Step four — the thirty minutes that convert

Do not email the report. The page is the product, and the product needs you beside it the first time.

Open with the finished number, not the method: *"This job made four thousand nine hundred, not the eight you thought."* Then stop talking. Owners need a moment with that, and the moment is where the engagement is won. Chapter 15 describes the particular quiet that follows; when you hear it, let it run.

Then walk the variance column, line by line, in plain language. Do not soften it and do not editorialise. The page is not an accusation — it is instrumentation, and instrumentation that flatters is worthless.

Close on the next quote rather than on your fee: *"If you priced the next one of these using this page, what would you change?"* Let him answer. He is now using your method, out loud, on his own business. That is the demonstration finishing itself.

Step five — the offer, made once

Most owners ask for the monthly service before you offer it. If he does not, make the offer plainly and only once.

The offer:

"That's exactly what the monthly engagement is — this page, every month, for every active job, plus the billings table so nothing goes unbilled and the retainage schedule so nothing goes uncollected. Here's what that costs."

Then hand over the tier sheet and stop. Do not discount in the silence. If the price is a problem, Chapter 13's line is the one to use: *"If the price needs to come down, let's decide together what comes out of the scope."*

Some clients sign in the room. Some take a month. Some never convert, and that is normal — but an owner who has seen a true number finds flying blind harder to tolerate afterwards, and that is worth something even when the answer is no.

IF THE SNAPSHOT WAS FREE OR DISCOUNTED

Trading a free or reduced-price snapshot for a testimonial is a perfectly ordinary way to begin. If you then publish what the client says about you, the arrangement has to be visible: under the Federal Trade Commission's Endorsement Guides, a material connection — money, free work, a discount, anything of value — must be disclosed clearly wherever the endorsement appears.

A line as short as "Job-costing snapshot provided at no charge" beside the quote does it, and costs you nothing: builders read that as confidence. Get written permission before publishing a client's name or figures, and never publish identifiable numbers without it.

Step six — the first ninety days

Whatever the engagement, over-deliver deliberately through the first quarter. Set the file up crisply to the Chapter 12 checklist. Walk the first monthly report pack through in person rather than attaching it. And surface one thing early that nobody asked you to look for — a retainage balance nobody was tracking, a billable stage that passed unbilled, a margin worth a conversation.

The first ninety days write the sentence this client will repeat about you for years. You are aiming for one sentence in particular, and it is not about your rates: *"She found money I didn't know I had."*

Three clients saying that version of it, and the referral engine in Chapter 14 starts turning without you cranking it.

Companion guide to The Construction Bookkeeper (Paperkeel Press). General educational information about bookkeeping practice — not accounting, tax, legal, insurance or financial advice. All figures are illustrative composites. Verify current federal, state, local and contractual requirements before acting.