Creating a Needs Assessment for Consumers

A needs assessment is a set of pre-planned questions about a consumer's project. Asking a few questions upfront will help reveal the consumer's buying clues and provide you some background about how the project discussion may unfold. This approach will greatly assist you in your in-home selling efforts.

Every consumer and every project will be different, so most of your questions will be specific to the job at hand. However, a good salesperson can dig deeper into a consumer's needs to gain insights into how they look at purchasing. The questions here may or may not be exactly what you want to ask — use them as a guide to pose questions based on your specific situation.

"What type of problems are you having with your system?"
This will tell you what they think the problem is and creates urgency to fix the problem.

"How long have you been considering this project?"
This helps create more urgency.

"What will be the most important factor in making this decision?"
This can be a good question to gauge their sensitivity to cost and help you transition the conversation to financing by saying, "I understand price is very important."

"Have you established a credit line for this improvement?"
Now you've planted the financing seed.

"What has prevented you from doing this until now?"
This implies that they are going to fix it or upgrade now and will give you more insight on how to sell to them.

"What types of projects have you done around the house?"
This gives you a sense of what they may have done before and what kind of scope they may have in mind now.

"Are you aware that we have special financing options available?"
This tells you about their financial preference and past methods of payment.

Don't be discouraged if consumers don't tell you they want to finance or if they say they only pay cash; the purpose is to get them talking and for you as a salesperson to listen.

These questions help develop rapport and put you in a position to help them get what they need or want.