

HOME SERVICES FINANCING

Contractor Sales & Cash-Flow Worksheet

**CONTRACTOR
GROWTH SERIES**

Use this worksheet to decide how financing will fit into your sales process, customer conversation, and business operations.

1. FINANCING VALUE CHECK

Which outcomes matter most to your business?

- ☐ Reduce price objections
- ☐ Give homeowners more payment flexibility
- ☐ Support better or more complete project scopes
- ☐ Improve cash-flow predictability
- ☐ Reduce accounts-receivable exposure

2. YOUR CURRENT PROCESS

- ☐ Yes ☐ Needs work We introduce financing before presenting final price.
- ☐ Yes ☐ Needs work We present total project cost and payment information clearly.
- ☐ Yes ☐ Needs work Our team can explain available pathways without giving financial advice.
- ☐ Yes ☐ Needs work We understand fees, funding timing, and required disclosures.

3. BUILD YOUR FINANCING CONVERSATION

Suggested opener: "Along with paying by check or credit card, we have several financing pathways available. Let's review the options so you can decide what works best for your project."

Our version: _____

Best time to introduce financing: _____

RBS CRM FINANCING HIGHLIGHTS

- ✓ No enrollment fee
- ✓ No dealer fee
- ✓ 100% of approved project amount paid upfront*
- ✓ Integrated into the proposal process

PROTECT TRUST: NEVER

- • Guarantee approval
- • Hide fees, interest, or conditions
- • Focus only on monthly payment
- • Pressure a homeowner or assume creditworthiness

4. 30-DAY ACTION PLAN

One change we will make: _____

Owner: _____ Due date: _____

How we will measure progress: _____

*Subject to lender approval, program requirements, documentation, and applicable terms. Sales representatives should provide accurate information and direct homeowners to lender disclosures.



ROOFING



SIDING



WINDOWS



DOORS



DECKING



CABINETS