GRIT GUIDE

BY GRIT BLUEPRINT

GRIT GUIDE

NO. 08

YOUR FIRST BUILDER MEETING

How to Prepare for a First Builder Meeting

Featuring Michael Tull and Marion Pulse

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THE PROBLEM

A builder who agrees to meet you is giving up time on a jobsite or in an office that never has enough of it. Most first meetings waste that time.

One hour of prep so your first meeting with a builder ends with a real next step.

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THE PLAN

7 STEPS

01 LEARN WHAT THEY BUILD AND HOW THEY BUY

02 GIVE THE MEETING ONE JOB

03 MAP WHO IS WHO

04 WRITE FIVE QUESTIONS ABOUT THEIR WORK

05 BRING ONE USEFUL THING

06 KNOW YOUR OWN ANSWERS

07 ASK FOR A NEXT STEP AND SEND YOUR NOTES THE SAME DAY

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STEP 1 OF 7

LEARN WHAT THEY BUILD AND HOW THEY BUY

Spend twenty minutes on what is public. Look at their website, their project photos and what they post about.

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STEP 2 OF 7

GIVE THE MEETING ONE JOB

Write one sentence that finishes this line: “When I leave, I want to know...”

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MAP WHO IS WHO

03

STEP 3 OF 7

The person you meet may not be the person who orders. The person who orders may not be the one who lives with the problem on site. Before the meeting, sketch the roles and leave the names blank:

- Owner: usually has the final say on suppliers.
- Estimator: works out what a job needs and what it will cost. This person often does the take-off, which means counting and measuring the materials from the plans.
- Project manager: runs the schedule and the budget for a job.
- Superintendent: runs the jobsite day to day and is there when your truck shows up.
- Installer or crew lead: handles your product.

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STEP 4 OF 7

WRITE FIVE QUESTIONS ABOUT THEIR WORK

Bring questions a supplier would need answered to serve the account well. Keep them short enough to say out loud.

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STEP 5 OF 7

BRING ONE USEFUL THING

Do not bring a catalog. Bring one thing that helps with the work you saw in step one. It could be a current lead time on a product they use, a sample they can hold, or a one-page sheet on how your delivery and returns work.

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STEP 6 OF 7

KNOW YOUR OWN ANSWERS

A builder will ask what you can do. Check these before you go: where you deliver and how often, how an account gets opened, who they call with a problem, and real lead times for the products they are likely to ask about.

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STEP 7 OF 7

ASK FOR A NEXT STEP AND SEND YOUR NOTES THE SAME DAY

Before you leave, ask for one small next step. A set of plans to quote. A visit to a jobsite. An introduction to the person who orders.

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THE CHECKLIST

FIRST BUILDER MEETING CHECKLIST

- [ ] I know what kind of work they do and where
- [ ] I listed what I know and what I am guessing
- [ ] I wrote one sentence on what I want to learn
- [ ] I sketched the roles on their team and know which ones to ask about
- [ ] I have five questions about how they work
- [ ] I am bringing one thing that is useful to them
- [ ] I checked our delivery area, lead times and account setup this week
- [ ] I know the next step I will ask for
- [ ] I blocked ten minutes after the meeting to send my notes

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WHY IT MATTERS

WILL YOU MAKE THE BUILDER'S JOB EASIER?

In many sales, the builder or contractor is the person who decides what gets installed. They go by what is easiest to install, what they trust, what they have seen work and what they remember.

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FINISH LINE

A one-page meeting plan: what you know about the builder, who is who on their team, five questions to ask, one useful thing to bring and the next step you will ask for.

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THE SOURCES

1. Why Contractors Will Control Your Revenue in 2026 (And What to Do About It) Stefanie Couch, Grit Blueprint
2. How to Build Trust With Customers in the Building Industry Stefanie Couch, Grit Blueprint
3. The Real Reason Customers Buy Again (Grit Blueprint Podcast, Michael Tull with host Stefanie Couch) Grit Guide
4. Marion Pulse on Confidence, Patience and Finding Your Place in Fenestration (Grit Blueprint Podcast) (December 2024) Grit Guide

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