GRIT GUIDE
BY GRIT BLUEPRINT

GRIT GUIDE
NO. 08

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YOUR FIRST BUILDER MEETING

How to Prepare for a First Builder Meeting

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

Featuring Michael Tull and Marion Pulse

gritguide.com/how-to-prepare-for-a-first-builder-meeting/

7 steps 9 min read Checklist to print

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YOU'LL FINISH WITH

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.

THE 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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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. The salesperson talks about the company, hands over a line card (a one-page list of the brands and products the company sells) and asks, “So what are you working on?”

You can do better with about an hour of preparation. This guide is for inside salespeople, who quote and handle orders from the store or office, and outside salespeople, who visit builders, contractors and jobsites. It works at a dealer, a distributor or a manufacturer. It works the same way whether the builder frames forty houses a year or remodels six kitchens. If those company types are new to you, read How the Building Industry Works first.

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. They steer away from anything that brings callbacks (return trips to a finished job to fix a problem), delays or headaches.

So the builder across the table has one quiet question. Will this person make my job easier or harder? Your preparation is the first answer they get.

Learn more from Stefanie Couch: Why Contractors Will Control Your Revenue in 2026 (And What to Do About It)

BEFORE YOU START

- The builder’s company name, website and any public project photos
- Your own delivery area, lead times (how long an order takes to arrive) and account setup steps, checked this week
- A notebook or notes app you will really use in the meeting
- The name of the person inside your company who would support this account

01 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. Write down what you can see: the kind of work, the size of the jobs, the areas they work in and any products that show up again and again.

Note whether they build new houses or do repair and remodel work, often shortened to R&R. The two run on different schedules and order in different ways. Do not assume one process fits both.

Then make two short lists: what you know and what you are guessing. Who orders material? Who decides where it comes from? Who do they buy from today? Do not fill in crew size, spending or what they are unhappy about from your own head. The guesses become your questions.

Last, look yourself up. Buyers now research your people as well as your company, and finding nothing reads as a risk. Search your own name the way the builder will. If nothing useful comes up, add a photo and one plain line about what you do to your LinkedIn profile today.

02 GIVE THE MEETING ONE JOB

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

For a first meeting, a good answer is about them. For example: “I want to know how they order windows and doors today and what goes wrong.” A meeting with one job is easier to run and easier to end on time.

Michael Tull has sold doors for more than fifty years as a manufacturer’s rep, a salesperson who represents manufacturers in a territory. On the Grit Blueprint Podcast he said he asks himself the same things before every call: “What am I gonna talk to them about? What is my goal to leave that place with?”

03 MAP WHO IS WHO

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.
- **Office staff:** place orders and pay invoices.

At a small remodeler, one person may wear four of these hats. Ask. Your goal is to leave knowing who fills each role you care about.

04 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.

- What kind of jobs fill most of your year?
- How do you order material for a job today, and who places the order?
- How far ahead do you usually know what you need?
- What does a good delivery look like on your sites?
- When an order goes wrong, what usually caused it?

These cover the work they do, how they buy, their schedule and what they expect from a supplier. If there is time, add one more: “What would make your next job easier?”

Ask, then stay quiet and write down the answer in their words. You will use those words later in your quote (your written price for the job) and your follow-up.

One caution. If a builder tells you they order at the last minute, ask why before you judge it. The reason may be crew timing, a job that ran long or no safe place to store material on site.

05 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. The goal is to make their job easier and to give them proof they can show their own customers, such as simple one-pagers and project photos.

Michael Tull has a saying for this: “Show and tell, watch it sell. If you don’t, it won’t.” A product that stays in the car does not get talked about.

If you have a view on something that may be costing them time, say it as an observation and ask if it fits. “Builders tell us special-order doors are where schedules slip. Is that true for you?” A special order is a product your company does not stock and has to order from the manufacturer for one job. Only say a line like that if it is true for you. If they say no, drop it and move on.

06 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. When you give a lead time, say what it covers. Ready at the plant and delivered to the site are different dates.

If you do not know something, say so and give a day. Marion Pulse, who sold windows and doors early in her career, tells newcomers: “It’s okay to say, I don’t know, and I’ll find the answer for you.” Then find it and call back when you said you would.

07 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.

Send a short note the same day. Say what you heard, what you will do and by when. Then do it by that day. Michael Tull calls the work after the first yes “keeping it sold.” His rule for it is simple: you do what you say you are going to do.

If your notes are rough, this prompt turns visit notes into a follow-up email. For the calls and texts that come after, use the customer follow-up scripts.

EXAMPLEMADE UP TO SHOW HOW IT WORKS

Sam sells for a building materials dealer and has a first meeting with a remodeler who mostly does kitchen and bath additions.

Sam's one job for the meeting: find out how they order windows and exterior doors today. From the remodeler's project photos, Sam sees a lot of black-framed windows and patio doors, so Sam checks current lead times on two black exterior options before the meeting and brings them on one page.

Sam's guess list has three lines: who orders, who they buy from now and how far ahead they plan. In the meeting, the owner says the office manager places every order, and that orders go wrong when sizes are read off the plans by different people. Sam writes that down word for word and asks to meet the office manager.

Sam leaves with one next step: the plan pages for the next addition, to quote by Friday. The note Sam sends that afternoon says what was heard, what Sam will do and the day it will be done.

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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Based on this guide's checklist. Credit: Grit Guide

The plan fits on one page on purpose. If you cannot fill in the first line, what they build and how they buy, move the meeting back a day and do that part first.

FINISH LINE

You should now have: 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.

WHAT TO DO NEXT

Once the meeting is on the calendar, read The Challenger Sale: The Main Lessons for Building Industry Sellers. It goes deeper on step five: how to bring a customer something useful to think about. If product words came up that you did not know, keep the Building Industry Glossary open.

Disclosure: Marion Pulse is now Client Success Director at Grit Blueprint, which publishes Grit Guide. Her words here come from her 2024 Grit Blueprint Podcast interview, recorded while she was at NFRC.

EPISODES IN THIS PIECE

Marion Pulse on Confidence, Patience and Finding Your Place in Fenestration

With Marion Pulse · The Grit Blueprint Podcast · Nov 2026

The Real Reason Customers Buy Again

With Michael Tull · The Grit Blueprint Podcast · Feb 2026

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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READ IT
ONLINE
This guide, the episode behind it and the rest of the Grit Guides are at **gritguide.com/how-to-prepare-for-a-first-builder-meeting/**

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