

Cleaning Sales Call Script And Lead Qualification

Practical cleaning business template • Customize fields before use

Brand customization: *This TidyOps-branded example shows a finished presentation. Replace the logo, colors, company details, and placeholders with your own brand before use.*

Template. We have strong assets for getting leads and following up with estimates, but there is a gap between those two stages: what happens when a prospect actually calls, texts, or submits a lead form?

This template gives owners, office staff, and future receptionists a consistent process for qualifying the opportunity, collecting the right information, handling common objections, and moving the prospect to an estimate, walkthrough, or booking.

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Template

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Provided by TidyOps

1. INBOUND CALL OPENING

Standard Greeting

“Thank you for calling [Company Name]. This is [Name]. How can I help you?”

If the customer asks about cleaning:

“Absolutely. I can help with that. I’ll ask you a few questions about the property and what you need cleaned so we can determine the right next step.”

2. CONTACT INFORMATION

Customer Name:

Phone:

Email:

Preferred Contact:

☐ Call

☐ Text

☐ Email

Service Address:

City:

ZIP / Postal Code:

Before spending substantial time quoting, confirm that the property is within the service



area.

3. HOW DID YOU HEAR ABOUT US?

- ☐ Google Search
- ☐ Google Maps
- ☐ Referral
- ☐ Facebook
- ☐ Instagram
- ☐ Flyer / Door Hanger
- ☐ Realtor
- ☐ Property Manager
- ☐ Existing Customer
- ☐ Returning Customer
- ☐ Other:

Referral Details

Referred By:

Capturing this during intake makes marketing attribution much more reliable.

4. WHAT SERVICE DO YOU NEED?

“Can you tell me a little about what you're looking for?”

- ☐ Standard Cleaning
- ☐ Recurring Cleaning
- ☐ Deep Cleaning
- ☐ Move-In Cleaning
- ☐ Move-Out Cleaning
- ☐ Office Cleaning
- ☐ Commercial / Janitorial
- ☐ Vacation Rental
- ☐ Post-Construction
- ☐ One-Time Cleaning
- ☐ Other:

5. CUSTOMER'S PRIMARY GOAL

“What would you most like us to help you with?”

Listen before jumping into a price.

The customer may care most about:

- ☐ Saving time
- ☐ Keeping up with recurring cleaning
- ☐ Preparing for guests
- ☐ Moving



- ☐ Catching up on accumulated cleaning
- ☐ Improving current cleaning quality
- ☐ Replacing another provider
- ☐ Preparing a property for sale
- ☐ Business/facility cleanliness
- ☐ Other:

6. PROPERTY INFORMATION

For residential leads:

Property Type:

- ☐ House
- ☐ Apartment
- ☐ Condo
- ☐ Townhome
- ☐ Other

Approximate Square Feet:

Bedrooms:

Bathrooms:

Levels:

Occupied: ☐ Yes ☐ No

Pets: ☐ Yes ☐ No

If yes:

7. CURRENT CONDITION

“How would you describe the current condition of the home?”

- ☐ Maintained regularly
- ☐ Light buildup
- ☐ Moderate buildup
- ☐ Heavy buildup
- ☐ Recently renovated
- ☐ Moving in/out
- ☐ Unsure

Useful follow-up:

“When was the property last professionally or thoroughly cleaned?”

Avoid making the customer feel judged. The purpose is estimating labor, not evaluating housekeeping habits.

8. PRIORITY AREAS

“Are there any areas you especially want us to focus on?”

- ☐ Kitchen



- ☐ Bathrooms
- ☐ Floors
- ☐ Dusting
- ☐ Baseboards
- ☐ Pet Hair
- ☐ Bedrooms
- ☐ Common Areas
- ☐ Other:

Customer Notes

9. ADD-ONS

Ask only about services the company actually provides.

- ☐ Inside Oven
- ☐ Inside Refrigerator
- ☐ Interior Windows
- ☐ Cabinet Interiors
- ☐ Laundry
- ☐ Dishes
- ☐ Linen Change
- ☐ Wall Washing
- ☐ Blinds
- ☐ Other:

10. SPECIAL SURFACES OR CONDITIONS

“Are there any special surfaces or conditions we should know about before preparing the estimate?”

- ☐ Natural Stone
- ☐ Hardwood
- ☐ Specialty Fixtures
- ☐ Delicate Items
- ☐ Heavy Pet Hair
- ☐ Construction Dust
- ☐ Excessive Clutter
- ☐ High Areas
- ☐ Other:

Notes:

11. SERVICE FREQUENCY

“Are you looking for a one-time cleaning or ongoing service?”

- ☐ One-Time



- ☐ Weekly
- ☐ Every Two Weeks
- ☐ Every Four Weeks
- ☐ Other
- ☐ Unsure

If unsure:

“We can compare the available options based on your property and how often you'd like help.”

12. TIMING

“When would you ideally like the cleaning completed?”

Preferred Date:

Deadline:

Flexible: ☐ Yes ☐ No

Reason for Deadline

- ☐ Regular Service
- ☐ Guests
- ☐ Move
- ☐ Closing
- ☐ Listing
- ☐ Event
- ☐ Tenant Turnover
- ☐ Other

Never promise availability before checking the actual schedule.

13. ACCESS

“How will our team access the property?”

- ☐ Customer Home
- ☐ Key
- ☐ Lockbox
- ☐ Building Access
- ☐ Door Code
- ☐ Other

Do not record unnecessary sensitive access credentials in general sales notes.

Collect actual credentials later through the company's secure access process.

14. PARKING & ACCESS LOGISTICS

Ask when relevant:

Parking:

Stairs / Elevator:



Building Restrictions:

Loading / Equipment Access:

15. QUALIFICATION CHECK

Before moving forward, confirm:

- ☐ Within service area
- ☐ Service offered
- ☐ Property type supported
- ☐ Timing potentially feasible
- ☐ Scope reasonably understood
- ☐ Customer expectations appear achievable
- ☐ No obvious safety issue
- ☐ No prohibited service request

16. WHEN YOU CAN PROVIDE AN IMMEDIATE ESTIMATE

“Based on the information you've given me, I can prepare an estimate for you.”

Then confirm:

Service:

Scope:

Frequency:

Add-Ons:

Estimated Price:

or:

Estimate will be sent via:

- ☐ Email
- ☐ SMS
- ☐ Other

17. WHEN YOU NEED MORE INFORMATION

“Before we finalize pricing, I'd like to get a little more information so we don't give you an inaccurate estimate.”

Next step:

- ☐ Customer sends photos
- ☐ Virtual walkthrough
- ☐ In-person walkthrough
- ☐ Additional questionnaire
- ☐ Supervisor review

18. COMMERCIAL LEAD QUALIFICATION

For commercial inquiries:



Company:

Facility:

Contact Role:

Facility Type:

Approx. Square Feet:

Number of Floors:

Current Cleaning Provider:

Desired Frequency:

Preferred Service Window:

Target Start Date:

19. COMMERCIAL SCOPE QUESTIONS

“What areas need cleaning?”

- ☐ Offices
- ☐ Restrooms
- ☐ Break Rooms
- ☐ Conference Rooms
- ☐ Lobbies
- ☐ Common Areas
- ☐ Warehouse
- ☐ Retail Areas
- ☐ Floors
- ☐ Windows
- ☐ Other

Ask about:

Restroom Count:

Flooring Types:

Consumables:

Periodic Services:

Security Requirements:

Special Facility Requirements:

20. COMMERCIAL NEXT STEP

For most meaningful commercial opportunities:

“The best next step is usually a facility walkthrough so we can understand the scope and service frequencies before preparing the proposal.”

Walkthrough

Date:

Contact:

Address:

Estimator:

21. PRICE QUESTION — BEFORE QUALIFICATION

Customer:

"How much do you charge?"

Response

"Our pricing depends on the property, service type, condition, and frequency. If I get a few details from you, I can help determine the appropriate price or next step."

Then continue qualification.

Avoid being evasive when the business actually publishes fixed pricing.

22. "THAT'S TOO EXPENSIVE"

Response

"I understand. We want to make sure we're comparing the right service. We can review the scope and frequency to see whether another option better fits what you need."

Then explore:

- ☐ Different frequency
- ☐ Different scope
- ☐ Remove optional add-ons
- ☐ Initial clean + maintenance
- ☐ Other legitimate option

Don't immediately discount the service.

23. "ANOTHER CLEANER IS CHEAPER"

Response

"That makes sense to consider. I would compare exactly what's included, the service frequency, and how each company handles things like scheduling and quality issues. If you'd like, I can walk you through what our estimate includes."

Avoid attacking competitors.

24. "I NEED TO THINK ABOUT IT"

Response

"Of course. Is there anything about the service, pricing, or schedule that I can clarify before you decide?"

If no:

"No problem. When would be a reasonable time for us to follow up?"

Follow-Up Date:

25. "I NEED TO ASK MY SPOUSE / PARTNER"

Response

"Absolutely. I'll make sure you have the estimate and service details so you can review

them together.”

Then:

“Would [Day / Date] be a reasonable time for me to check back?”

26. “JUST SEND ME A PRICE”

When enough information is missing:

“I can certainly send an estimate. I just want to avoid giving you a number that changes later because we didn't understand the property. I need [specific missing information], and then we can prepare the estimate.”

27. “CAN YOU COME TODAY?”

If availability is unknown:

“I can check our current schedule. Let me confirm what's available before promising a time.”

If unavailable:

“We don't currently have an opening today. The next available option is [accurate availability].”

28. “CAN YOU MATCH THIS PRICE?”

Response

“We price our service based on the scope and resources required to perform it. I'm happy to review our estimate with you and make sure the service is configured correctly.”

Avoid automatic price matching unless that is an intentional company policy.

29. “CAN YOU DO JUST THESE ROOMS?”

If offered:

“We may be able to customize the scope. Let me confirm the rooms and tasks you need so we can determine the appropriate service and minimum charge.”

If not offered:

“Our current service is structured around [actual policy], so we wouldn't be the right fit for that particular request.”

30. “DO I HAVE TO SIGN A CONTRACT?”

Answer according to the company's actual policy.

Example:

“Our residential recurring service [does/does not] require [agreement/commitment]. I'll send

you the applicable service terms before you approve the service.”

Never improvise contract terms during a sales call.

31. “WHAT IF I'M NOT HAPPY?”

Answer using the actual quality policy.

Example:



"If something covered by the agreed service wasn't completed properly, contact us within [actual policy period] and we'll follow our service-quality process."

Do not promise refunds, guarantees, or remedies outside company policy.

32. TRUST QUESTIONS

Customers may ask:

"Are you insured?"

"Do you background-check cleaners?"

"Do you bring supplies?"

"Will I have the same cleaner?"

"Are your cleaners employees?"

"Do I need to be home?"

"Do you have a satisfaction guarantee?"

Create approved company answers for each.

Approved Answer Library

Insurance:

Background Checks:

Supplies:

Cleaner Assignment:

Worker Relationship:

Customer Presence:

Quality Policy:

This prevents staff from accidentally making inaccurate promises.

33. CLOSE — ESTIMATE

"Based on what we've discussed, the next step is for me to send your estimate."

Confirm:

Email:

Phone:

"Once you receive it, you'll be able to review the scope and pricing. If you have questions, just reply or contact us."

34. CLOSE — BOOKING

If the customer is ready:

"Great. Let's get the service scheduled."

Confirm:

Service:

Date:

Arrival Window:

Price:

Access:

Special Instructions:

Then follow the company's booking/payment/agreement process.

35. CLOSE — WALKTHROUGH

"The next step is a walkthrough so we can assess the property and prepare an accurate proposal."

Confirm:

Date:

Time:

Address:

Who Will Attend:

36. CLOSE — NOT A FIT

Not every lead should become a customer.

"Based on what you're looking for, I don't think our current service is the right fit for this particular job."

Where appropriate:

"Our service focuses on [Service Type], while your project requires [Different Need]."

Be courteous and clear rather than accepting work the company cannot safely or profitably perform.

37. LEAD PRIORITY

HIGH

- ☐ Service area match
- ☐ Service match
- ☐ Clear need
- ☐ Appropriate timing
- ☐ Decision-maker engaged
- ☐ Ready for estimate / walkthrough

MEDIUM

- ☐ Valid opportunity
- ☐ Future timing
- ☐ Needs additional information
- ☐ Comparing options

LOW / NURTURE

- ☐ Long-term timing
- ☐ Uncertain need
- ☐ Not ready

DISQUALIFIED



- ☐ Outside service area
- ☐ Unsupported service
- ☐ Unsafe request
- ☐ Schedule impossible
- ☐ Other:

38. LEAD STATUS

- ☐ New
- ☐ Contacted
- ☐ Qualified
- ☐ Walkthrough Needed
- ☐ Estimate Needed
- ☐ Estimate Sent
- ☐ Follow-Up
- ☐ Won
- ☐ Lost
- ☐ Nurture
- ☐ Disqualified

39. LOST REASON

If the lead does not convert:

- ☐ Price
- ☐ Competitor
- ☐ Timing
- ☐ No Response
- ☐ Outside Service Area
- ☐ Service Not Offered
- ☐ Schedule
- ☐ Customer Not Ready
- ☐ Scope / Expectations
- ☐ Other

Capture this consistently rather than writing random notes.

40. REQUIRED NEXT ACTION

Every viable lead should leave the conversation with a next action.

Next Action:

Owner:

Due Date:

Follow-Up Method:

A lead with no next action is easy to lose.



41. CALL NOTES

Customer's Main Need

Important Property Information

Objections / Questions

Commitments We Made

Next Step

Record commitments carefully. If someone tells the customer something will be included, the operations team needs to know.

42. CALL QUALITY SCORECARD

For training office staff:

Area

Score

Professional Opening

/ 5

Contact Information

/ 5

Needs Discovery

/ 5

Property Qualification

/ 5

Service Explanation

/ 5

Pricing Communication

/ 5

Objection Handling

/ 5

Next Step Established

/ 5

Accurate Notes

/ 5

Professional Close

/ 5

Total

/ 50

Use call-quality scoring primarily for training and process improvement rather than rewarding employees for aggressive sales behavior.

43. SALES METRICS



Track:

Inbound Leads:

Leads Contacted:

Qualified Leads:

Estimates Sent:

Walkthroughs Scheduled:

Customers Won:

Revenue Won: \$

Contact Rate

$\text{Contacted} \div \text{Inbound Leads}$

%

Qualification Rate

$\text{Qualified} \div \text{Contacted}$

%

Estimate Rate

$\text{Estimates} \div \text{Qualified Leads}$

%

Close Rate

$\text{Customers Won} \div \text{Qualified Leads}$

%

44. RESPONSE-TIME TRACKING

Lead Received:

First Response:

Response Time:

Tracking this can help identify whether otherwise-good leads are being lost because nobody responds promptly.

45. CALL SCRIPT CUSTOMIZATION

Before giving this script to staff, document approved company answers for:

- ☐ Service area
- ☐ Minimum charge
- ☐ Cleaning frequencies
- ☐ Service definitions
- ☐ Add-ons
- ☐ Pricing process
- ☐ Same-day requests
- ☐ Availability
- ☐ Cancellation policy



- ☐ Payment policy
- ☐ Access policy
- ☐ Pet policy
- ☐ Quality / reclean policy
- ☐ Insurance
- ☐ Background checks
- ☐ Supplies
- ☐ Commercial walkthroughs
- ☐ Services you do not perform

46. PRIVACY & PAYMENT INFORMATION

Do not use ordinary sales-call notes to store unnecessary sensitive information such as:

Payment card numbers

Bank information

Passwords

Full alarm credentials

Government identification numbers

Use appropriate systems and processes for sensitive information.

47. RECORDING NOTICE

If calls are recorded, transcription or AI analysis is used, determine what consent, notification, retention, privacy, employee, and other requirements apply to your business and jurisdictions.

Call-recording requirements can vary significantly.

48. COMMUNICATION NOTICE

Telephone, SMS, email, automated follow-up, marketing, and sales communications may be subject to consent, identification, opt-out, telemarketing, privacy, and other requirements.

A customer making an inquiry does not necessarily authorize every type of future marketing communication.

TEMPLATE NOTICE

This template is a general sales and operations resource and is not legal, privacy, employment, telemarketing, or communications-compliance advice.

Customize scripts so employees provide accurate information about your actual services, prices, policies, qualifications, and availability.

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For the library metadata:

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This one has a particularly important product implication for TidyOps. The eventual lead screen should guide the salesperson dynamically rather than display a giant static form. If the caller says “move-out,” TidyOps asks move-out questions; if they say “commercial,” it switches to facility qualification; if they mention recurring service, it presents frequency options.

That same structured conversation can then create the customer/property record, recommend the appropriate service, prepare the estimate inputs, schedule a walkthrough when required, and create the follow-up task. It also lays excellent groundwork for the future AI receptionist: the receptionist should operate from the same qualification rules and approved-answer library as human staff, rather than having a separate sales process.

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Legal Review Flag: Privacy / call recording / communications disclaimer

Primary CTA: Manage Cleaning Leads & Sales with TidyOps

Product Route: Leads / Customers / Estimates / Follow-Ups / Reporting