****

**CNHS ToolBox™ Forms Overview**

The following offers suggested uses for the various CNHS ToolBox™ forms and checklists.

**Pre-Construction Planning Checklist**

**Form TB001**

Use this checklist as an outline to discuss the steps in the process of planning and finalizing decisions prior to the start of construction. In this way, the form works as a sales tool to help you share your expertise and discuss your ability to assist the customers through the process. As you explain each step you can also describe the other checklists or organizational forms you can provide to help them, or other information or services you can offer.

When a customer decides to proceed with the buying process, this form can then be used as a planning tool, tracking each step, the date of completion and keeping brief notes as necessary. This should help buyers feel more in control and help them focus their time and energy more effectively.

**Building Site Evaluation Checklist**

**Form TB002**

Various uses of this form are described in the certification training. In working with buyers, this can be first used as an outline to discuss the important considerations when comparing one building site to another. You might supply several copies of this form to your customers and encourage them to use it as a guide in gathering information, and then as a summary for their final evaluation and site selection. In your discussion of site evaluation, remember to explain the three important areas of site impact:

1. The lifestyle of the owners
2. The design of the residence
3. The cost of construction

**Design Information Organizer  
Form TB003**

This important tool helps save time for you and the builder. It also helps your customers organize their information much more effectively during the design or plan selection process. You can explain the use of this form and then give it to the buyers for completion on their own. Whether you are helping them select currently available market homes, or discussing design details with a builder or designer, this information will be essential. Many associates have also found this form helpful when working with resale buyers.

The design information organizer could also be sent or delivered to a builder prior to the first customer meeting. This would be an excellent time to register your prospects with the builder as well. The builder could then prepare in advance to show designs that are targeted to the buyers specific needs, and save time for everyone in the process.

An excellent idea with couples is to provide several copies for each of them to complete individually, and a third copy for their agreed final information. The design information organizer is a form you may also want to offer as a free give-away in your advertising or on your website to stimulate contact from prospects.

**Construction Specifications Checklist**

**Form TB004**

The primary purpose of this checklist is to help buyers assure that specifications are detailed and comprehensive to make sure there is a clear understanding of the scope of work. This form is also helpful in comparing specifications and pricing from one builder to another. As discussed in the training, it is in the interest of all parties involved that specifications and details are clearly understood. This is one of the keys to establishing realistic expectations.

Another excellent use of this form is as an outline to guide discussions of the various details of construction and quality considerations. Remember that many of the illustrations and checklists in the construction portion of the Certification Workbook as well as many graphics and photos in the *Residential Construction Certified™* course can also be helpful in these discussions.

**Construction Scheduling Flow Chart**

**Form TB005**

This is a copy of the same flow chart you completed during the certification training. Your best use of this form is simply as an aid in discussing the sequence and details of construction. Remember to point out the many variables involved, and to discuss the challenges facing the builder in scheduling and constructing a new home. You may want to review the list of *Builders’ Risks* as well as the *Dynamics of Scheduling* in the course materials. A copy of both of these lists would be a helpful addition to your presentation materials.

**Construction Agreement Checklist**

**Form TB006**

The use of this checklist is described at the top of the form. As you are aware, this checklist can be an important tool in helping to establish a comprehensive agreement between parties. However, it is advisable to confirm the use of this form with your company management or legal counsel. To facilitate any discussion of the details of new home contracts, refer to the certification training.

**Selection Scheduling Flow Chart**

**Form TB007**

This flow chart is an excellent tool to help both buyers and builders achieve the goal of prompt selections and timely completion of construction. As described in the training program, this form should be completed based on information provided by the builder.

The selections to be made are listed in the column to the left, the names of the months are filled out across the top row, and blocks are filled in to indicate the appropriate time for finalizing each selection. Three copies should be made – one for the builder, one for the buyer and one for your file.

When working with higher volume, or “production builders,” most selections may be required before the start of construction. In the case of custom builders, however, selections are often made at different stages throughout construction. It may be beneficial to discuss the use of this form with your *Registered Builders* prior to use with customers. Most should appreciate the benefits of this organizational tool if they do not have a well-designed system of their own.

**Prospect Registration Form**

**Form TB008**

As explained in *Suggestions for Working With Builders*, this form is designed to protect your co-broke interest through the written registration of prospects. This form should only be used with management approval. An alternate form may be preferred to maintain conformance with company policies or local customs.

**Registered Builder Agreement**

**Form TB009**

The use of this form is discussed in *Suggestions for Working With Builders.* As with the *Prospect Registration,* this should be used only with management approval.

**Local Reference Sheet**

**Form TB010**

This form is designed for use along with a map of your market area. Number a list of active new home communities, which are then identified by corresponding numbers on the map. Colored dots can be numbered and used to represent housing in different price ranges.

**Builder Evaluation Summary**

**Form TB011**

This form can be used for your own evaluation of builders in your area as you identify and compare builders to work with as *Registered Builders,* or as prospects to pursue for builder representation. Additionally, this form could be offered to your buyers as a tool to help them compare and evaluate builders as candidates to build their new home.

**Detailed Builder Profile**

**Form TB012**

This much more detailed builder evaluation form, based on the following *Builder Marketing Profile,* allows you to organize more in depth information as you identify and evaluate builders in your area. After gathering information in the various categories of this form you may choose to complete the *Builder Evaluation Summary* as a tool to use with your customers.

**Builder Marketing Profile**

**Form TB013**

The use of this form is described in detail in the certification training. It is designed to facilitate your research and planning for the purpose of successfully marketing a builder. Initially, parts of the form are designed for tracking follow-up and initial information gathering. Later, portions of the form can be used to interview the builder and identify specific interests relative to the various services and support you can provide. After you have begun your work in marketing a builder, this form can be periodically updated to help you develop and improve the overall marketing program.

**Prospect Profile Summary**

**Form TB014**

As described in the certification training, this form is used to summarize all important prospect information and can be used for the purpose of organizing interviews and qualification of prospects.

**Prospect Follow-Up Summary**

**Form TB015**

If you are not now using an organized follow-up system, you will find this to be a great benefit to your business for both new homes and resales. Many associates have reported an increase in sales up to two or three times over previous levels. This form is used in the various tabbed sections of the *Prospect Follow-Up System* described in the training program, for tracking phone calls, follow-up information and the buying status of prospects.

**Community Evaluation Form**

**Form TB016**

Whether working as a buyer or a builder representative, it’s important for you to maintain an awareness of the various active new home communities in your market. This form is designed to help you organize information that is helpful in this regard. Gathering this information usually involves contact with the sales reps, developers, building, zoning and planning department officials as well as interviews with current residents. The greater your knowledge, the more important you become as a resource to your builder and buyer customers.

**Demonstration Organizer**

**FormTB017**

This form is designed for your use in identifying and demonstrating the features and benefits of your new homes. In preparing your demonstration, you would fill out a master of this form for each important room of the model home you’re demonstrating with features, benefits and qualifying questions you might ask in each room to involve your prospects. As you make your demonstration, using these pre-filled forms as a reference, you can use the top sections to take notes of your conversation and qualification of your prospects. Along the side of the form, as a reminder, are the areas of buyer decision-making as well as the four barriers to closing.

Whether simply filling out the forms in preparation, or actually using them during your demonstrations, this tool can take your sales presentations to a much higher level. The certification training discusses the details of effective demonstration and the use of this form is described as well.

**Demonstration Checklist**

**FormTB018**

This checklist is intended to key your mind to various details and features you may want to incorporate in filling out the previous *Demonstration Organizer* form. This checklist can also be used as a tool in generating sales collaterals such as specifications or brochures that discuss features and benefits.

**Materials Selection Forms**

**Forms TB019 – TB025**

This series of forms can be used as either a builder or buyer representative to help your customers and your builders clearly identify all details necessary for various typical selections. When consistently used, these forms eliminate many of the problems associated with this process. At the bottom of each form, important dates can be tracked as well as final customer authorization in writing. Incorporating a reference describing the use of these forms in the contract documents is also an additional safeguard. Further discussion in this area can be found in the certification training in the *Customer Service* and *New Home Construction Agreement* sections.

**Sales & Marketing Preparation Planner**

**TB026**

This form is designed to help you plan and track your progress in development of the various materials and activities important to your promotional or marketing programs. To key your mind to possible action items, it may be helpful to page through your notes in the *Certification Workbook* and review the segments of training regarding preparation, prospecting and creative marketing ideas.

**Sales & Marketing Preparation Flow Chart**

**TB027**

This is an alternative design of the Preparation Planner above that allows you to develop and track a visual timeline of activities similar to the Construction Scheduling Flow Chart.