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| --- | --- | --- | --- | --- |
| Follow-Up Summary | | | | |
| **Date** | **Status** | | | **Notes** |
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| --- | --- | --- |
| **General Information** | | |
| Company Name: | | Phone: |
| Address: | | |
| Builder: | | |
| Pager: | E-Mail: | Fax: |
| Key Contact: | Position: | Phone: |
| Key Contact: | Position: | Phone: |
| Key Contact: | Position: | Phone: |
| Key Contact: | Position: | Phone: |

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# **Builder Marketing Profile**

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# **Builder Marketing Profile**

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|  |
| --- |
| **Management Goals and Perspectives** |
| ***Describe how the owners and management view the following:*** |
| Current Status of Company: |
|  |
|  |
|  |
|  |
| Future Goals of Company: |
|  |
|  |
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| **Company Organization** |
| ***Identify individuals and their responsibilities in the following areas:*** |
| Management: |
|  |
|  |
| Office Staff: |
|  |
|  |
| Field Supervision: |
|  |
|  |
| Sales / Marketing: |
|  |
|  |
| Other: |
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| **Current Operations** |
| ***Describe company activities, methods, strengths or weaknesses in the following areas:*** |
| Design: |
|  |
| Pricing / Estimating: |
|  |
| Contract Finalization: |
|  |
| Mortgage Processing: |
|  |
| Customer Services: |
|  |
| Warranty Service: |
|  |
| Selections / Changes: |
|  |
| Cost Control: |
|  |
| Orientation / Closing: |
|  |
| Construction Supervision: |
|  |
| Sales / Marketing: |
|  |
|  |
| Unique Features of Design, Construction or Service: |
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# **Builder Marketing Profile**

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| --- | --- | --- | --- | --- |
| **Active Communities** | | | | |
|  | | | | |
| Name: | | Developer: | | |
| Location: | | Lot Sizes: | | Total Lots: |
| Lot Pricing: | Lots Owned: | | Lots Options: | |
| Home Styles: | | | Price Range: | |
| Competitors: | | | | |
| Community Features: | | | | |
| Builder’s Homes Available: | | | | |
|  | | | | |
| Name: | | Developer: | | |
| Location: | | Lot Sizes: | | Total Lots: |
| Lot Pricing: | Lots Owned: | | Lots Optioned: | |
| Home Styles: | | | Price Range: | |
| Competitors: | | | | |
| Community Features: | | | | |
|  | | | | |
| Builder’s Homes Available: | | | | |
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| Summary: | | | | |
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| **Current Activities** | | | |
| Sales Projected This Year: | | Sales Completed This Year: | |
| Sold But Not Completed: | Specs: | | Customs: |
| Specs Completed But Not Sold: | | Specs Under Construction: | |
| Models Completed In Use: | | Models Under Construction: | |
| Available Lots Owned: | | Available Lots Optioned: | |

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| **Sales and Marketing Services** |
| ***Describe the Builder’s interests relative to your involvement in the following:*** |
| Market Research & Planning: |
|  |
|  |
| Product Design & Pricing Strategies: |
|  |
|  |
| Coordination of Advertising & Promotion: |
|  |
|  |
| Staffing & Sales Responsibilities: |
|  |
|  |
| Customer Service, Move-in & Closing: |
|  |
|  |
| Development of Sales Tools and Marketing Materials: |
|  |
|  |
| Coordination of Cooperative Brokers: |
|  |
|  |
| Identification of Land Opportunities: |
|  |
|  |
| Other: |
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# **Builder Marketing Profile**

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**Buyer Profiles** – PAST \_\_\_\_\_\_\_ YEARS

ARCHITECTURAL STYLE

\_\_\_\_% Traditional

\_\_\_\_% Contemporary

\_\_\_\_% Transitional

\_\_\_\_% Single-Family

\_\_\_\_% Multi-Family

SQUARE FOOTAGE

\_\_\_\_% Under 2,000

\_\_\_\_% 2,000 – 3,000

\_\_\_\_% 3,000 – 4,000

\_\_\_\_% 4,000 – 5,000

\_\_\_\_% 5,000 +

FLOOR PLAN

\_\_\_\_% 1 Story

\_\_\_\_% 1½ Story

\_\_\_\_% 2 Story

\_\_\_\_% Split-Level

\_\_\_\_% Bi-Level

INCOME

\_\_\_\_% Under $30,000

\_\_\_\_% $30 - $50,000

\_\_\_\_% $50 - $100,000

\_\_\_\_% $100 - $200,000

\_\_\_\_% $200,000 +

MARKET SEGMENT

\_\_\_\_% First Time

\_\_\_\_% Move-Up

\_\_\_\_% Empty Nester

\_\_\_\_% Single

\_\_\_\_% Family

AGE

\_\_\_\_% 20 – 29

\_\_\_\_% 30 – 39

\_\_\_\_% 40 – 49

\_\_\_\_% 50 – 59

\_\_\_\_% 60 +

|  |
| --- |
| Previous Residence Locations: |
|  |
|  |
|  |
| Reasons For Buying From Builder: |
|  |
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|  |
| Buyers Perceptions of Builder: |
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# **Builder Marketing Profile**

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| --- | --- | --- | --- |
| **Builder References** | | | |
| Question customer, trade and banking references relative to: | | | |
| * Reputation | * Communication | | * Customer Service |
| * Quality | * Honesty | | * Follow-Through |
| * Organization | * Cooperation | | * Financial Stability |
|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
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|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
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|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
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| Reference: | | Relationship: | |
| Perceptions: | | | |
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| Reference: | | Relationship: | |
| Perceptions: | | | |
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