|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Follow-Up Summary | | | | |
| **Date** | **Status** | | | **Notes** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **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: |

PAGE\_\_\_\_

FORM TB013 © 2000 Dennis Walsh & Associates, Inc.

**Certified New Home Sales System™**

# **Builder Marketing Profile**

PAGE\_\_\_\_

FORM TB012 © 2025 Dennis J. Walsh

**Certified New Home Specialist™**

# **Detailed Builder Profile**

|  |
| --- |
| **Management Goals and Perspectives** |
| ***Describe how the owners and management view the following:*** |
| Current Status of Company: |
|  |
|  |
|  |
|  |
| Future Goals of Company: |
|  |
|  |
|  |
|  |

|  |
| --- |
| **Company Organization** |
| ***Identify individuals and their responsibilities in the following areas:*** |
| Management: |
|  |
|  |
| Office Staff: |
|  |
|  |
| Field Supervision: |
|  |
|  |
| Sales / Marketing: |
|  |
|  |
| Other: |
|  |
|  |

PAGE\_\_\_\_

FORM TB012 © 2025 Dennis J. Walsh

**Certified New Home Specialist™**

# **Detailed Builder Profile**

|  |
| --- |
| **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: |
|  |
|  |
|  |
|  |
|  |

PAGE\_\_\_\_

FORM TB012 © 2025 Dennis J. Walsh

**Certified New Home Specialist™**

# **Detailed Builder Profile**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **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: | | | | |
|  | | | | |
| Summary: | | | | |
|  | | | | |
|  | | | | |
|  | | | | |
|  | | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **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: | |

PAGE\_\_\_\_

FORM TB012 © 2025 Dennis J. Walsh

**Certified New Home Specialist™**

# **Detailed Builder Profile**

|  |  |  |  |
| --- | --- | --- | --- |
| **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: | | | |
|  | | | |
|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
|  | | | |
|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
|  | | | |
|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
|  | | | |
|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
|  | | | |
|  | | | |
| Reference: | | Relationship: | |
| Perceptions: | | | |
|  | | | |
|  | | | |

PAGE\_\_\_\_

FORM TB012 © 2025 Dennis J. Walsh

**Certified New Home Specialist™**

# **Detailed Builder Profile**