



Certified *NEW HOME* *SPECIALIST*TM

Certification Worksheets

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Opportunities in New Home Sales

Why are there opportunities in new home sales?

- 1.
- 2.
- 3.
- 4.
- 5.

What are the opportunities in new home sales?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Marketing Driven Sales Success

For decades, sales of new homes have been

For success today, sales of new homes must be

The “Marketing-Driven” Approach:

- 1.
- 2.
- 3.
- 4.

Marketing is

New Home Trends

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

New Home Trends

13.

14.

15.

16.

17.

18.

19.

20.

21.

1.

2.

3.

4.

5.

Housing Industry Online Information Sources:

1. NAHB Online: nahb.org

2. Builder Magazine: builderonline.com

3. Professional Builder Magazine: probuilder.com

Builder's Responsibilities

What services and responsibilities should new home buyers expect from their builder?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.

Words of Wisdom

“The trouble with using experience as a guide is that the final exam often comes first — and then the lesson.”

Builder's Risks

What are some of the risks faced by builders as they work to service their customers, meet their contractual obligations, and earn a reasonable profit?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.

Words of Wisdom

“A builder is a gambler that never gets to shuffle, cut or deal!”

Typical Costs of a New Home



Understanding the Builder's Perspective

To effectively service builders, we must understand their perspective:

- Motivations

Our focus, then, should be a “_____” approach to providing sales and marketing services.

Areas of Sales and Marketing Services

Although it's important to assess builders' needs on an individual basis, the primary areas of sales and marketing responsibility include the following:

1. Marketing Management

- Market Research to Identify Market & Land Opportunities
- Develop Product Design, Positioning & Pricing Strategies
- Finalize Marketing Strategies & Budgets
- Coordinate Design & Production of Materials
- Coordinate On-Site Sales & Promotional Activities
- Measure Marketing Return-On-Investment

2. Sales Management

- Promotion to Prospective Buyers
- Promotion to Cooperative Broker Network
- Promotion to Relocation Buyers
- Coordinate Sales of Existing Homes
- Staff Sales Centers & Promotional Events
- Deliver Sales Presentations & Follow-Up to Contract
- Provide Customer Service
- Follow-Up Past Customers

Construction Financing

Two types of financing typically used to provide funds through the process of construction:

1.

2.

The typical loan application package includes:

1.

2.

3.

4.

5.

6.

7.

-
-
-
-
-

Waiver of Priority — _____

Memorandum of Transfer — _____

Negotiating the Contract

A well-written construction contract is important for establishing:

- 1.
- 2.
- 3.

What are some of the factors that influence negotiations?

- 1.
- 2.
- 3.
- 4.

Words of Wisdom

“Oral agreements are only as good as the paper they’re written on.”

Contract - Identification

1. Identification

A. Parties of the Contract

B. Building Site

C. Scope of Work

It is important for the plans and specifications to be

2. Financing

A. Construction Financing

B. Permanent Mortgage Commitment

C. Conveyance of Land to Builder

Contracts - Site Considerations

3. Site Considerations

A. Deed Restrictions

B. Title Conditions

C. Utilities

D. Survey

E. Unknown Conditions

Contracts - Pricing / Payment

4. Pricing and Payment Terms

A. Purchase Price

B. Selections and Allowances

C. Deposits

D. Progress Payments

E. Changes and Extras

Construction Loan Payment Request

CONSTRUCTION LOAN PAYMENT REQUEST

Loan # _____

House # _____

Street _____ City _____ County _____

I hereby request payment from the above referenced Construction loan account to the following:

PAYEE	AMOUNT
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Invoices detailing above amounts are attached herein. I certify that all above invoices reflect labor and materials provided for the above described premises.

Construction loan amount _____

Previous payments _____

Balance _____

Amount of this draw _____

Balance _____

By: _____
Owner

Contractor/arch.

Additional Work Authorization

ADDITIONAL WORK AUTHORIZATION

YOUR FIRM NAME HERE

123 Main Street
YOUR TOWN, STATE and ZIP
Phone 123-4567

OWNER'S NAME		PHONE	DATE
STREET		JOB NAME	JOB NUMBER
CITY	STATE	STREET	
EXISTING CONTRACT NO.	DATE OF EXISTING CONTRACT	CITY	STATE

You are hereby authorized to perform the following specifically described additional work:

ADDITIONAL CHARGE FOR ABOVE WORK IS: \$ _____

Payment will be made as follows: _____

Above additional work to be performed under same conditions as specified in original contract unless otherwise stipulated.

Date _____ 19 ____ Authorizing Signature _____
(OWNER SIGNS HERE)

We hereby agree to furnish labor and materials – complete in accordance with the above specifications, at above stated price.

Authorized Signature _____ Date _____ 19 ____
(CONTRACTOR SIGNS HERE)

THIS IS CHANGE ORDER NO. _____

NOTE: This Revision becomes part of, and in conformance with, the existing contract.

Contracts - Construction / Insurance

5. Construction

A. Commencement Conditions

-
-
-
-
-
-

B. Substitution of Materials

C. Selections

D. Construction Utilities

6. Insurance and Risk of Loss

A. Risk of Loss Responsibility

B. Coverage Limits

C. Distribution of Proceeds

Contracts - Completion

7. Completion

A. Stipulated Completion Date

B. “Substantial Completion”

C. Occupancy Provisions

D. Acceptance by Owner

E. Incomplete Items

F. Escrow Instructions

Holdback Final Inspection Report

Purchaser(s): _____

Address: _____

On the _____ day of _____, I/We made a thorough inspection of the above home with _____, a representative of (builder) _____, and found it to be completed to our satisfaction except for the following:

Item:	Cost:
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
7. _____	\$ _____
8. _____	\$ _____
9. _____	\$ _____
Total cost of items above	\$ _____

In consideration of the above, the sum of \$ _____ will be held in escrow by _____ and released in accordance with the terms and conditions of the original purchase agreement.

By: _____
Builder Representative

Purchasers

Contracts - Warranties/Dispute Resolution

8. Warranties

-
-

9. Dispute Resolution

- Arbitration

The parties can provide for arbitration of future disputes by inserting the following standard arbitration clause into their contracts:

“Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration in accordance with the Construction Industry rules of the American Arbitration Association, and judgment upon the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof.”

For further information contact:

American Arbitration Association

1.800.778.7879

www.adr.org

Contracts - Notifications / Attachments

10. Notices

11. Defaults

12. Acceptance and Binding Effect

13. Attachments

-
-
-
-
-
-
-

Successful Buyer - Builder Relations

The true keys to a successful buyer - builder relationship are:

- 1.
- 2.
- 3.
- 4.

Words of Wisdom

Agreements Prevent Disagreements!

The Counselling Approach to Sales

Sales - the act of offering goods and services in exchange for money.

How else might we define sales in terms of a long-term successful career?

Sales is

Words of Wisdom

“The profession of selling soon teaches you that people do things for their own reasons — not yours.”
- Zig Ziglar

Differences in New Home Sales

How does selling new homes compare to selling resales?

Resales	vs.	New Home Sales
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Words of Wisdom

“In new home sales, we are selling tomorrow’s values today.”
- Dave Stone

New Home Buyers' Decisions

To finalize decisions and make a commitment to purchase a new home, buyers are searching for answers to many questions!

Buyers must decide on:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Who can best provide the guidance and information they need? _____

Our Goals in New Home Sales

A substantial investment is made to bring each qualified prospect — we must make the most of each opportunity!

Our Goals:

- 1.
- 2.
- 3.

The first step is to leave a “positive lasting impression.”

They must remember:

- 1.
- 2.

Critical Path to New Home Sales

Words of Wisdom

"The pros do the basics well every day."
- Vincent T. Lombardi

The Critical Path to New Home Sales

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

***It is only through an organized approach to sales
that we can do the basics well every day!***

Preparing Knowledge for Sales Success

Words of Wisdom

“When I get ready to talk to people, I spend two-thirds of my time thinking about what they want to hear, and one-third thinking about what I want to say”
- Abraham Lincoln

Sales Knowledge

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Words of Wisdom

“Before everything else, getting ready is the secret to success.”
- Henry Ford

CERTIFIED NEW HOME SPECIALIST™ COMMUNITY EVALUATION FORM

Evaluated By:	Date:
---------------	-------

GENERAL	
Development:	Location:
Developer:	Phone:
Total Development Size:	Number of Sites:
Utilities:	
Amenities:	
Notes:	

SITE MIX			
Site Type:	Size:	Pricing:	#
Notes:			
Site Type:	Size:	Pricing:	#
Notes:			
Site Type:	Size:	Pricing:	#
Notes:			
Site Type:	Size:	Pricing:	#
Notes:			

HOMES MIX			
Home Style:	Size:	Pricing:	#
Builder:	Features:		
Notes:			
Home Style:	Size:	Pricing:	#
Builder:	Features:		
Notes:			
Home Style:	Size:	Pricing:	#
Builder:	Features:		
Notes:			
Home Style:	Size:	Pricing:	#
Builder:	Features:		
Notes:			

CERTIFIED NEW HOME SPECIALIST™ COMMUNITY EVALUATION FORM

COMMUNITY EVALUATION

Entry / Approach:		
Landscape Features:		
Signage:		
Location:	Privacy:	Security:
Amenities:		
Notes:		

MARKETING PROGRAM

Describe:

SALES HISTORY

Period From:	To:	# Sold:	Sold to Date:
Notes:			
Period From:	To:	# Sold:	Sold to Date:
Notes:			
Period From:	To:	# Sold:	Sold to Date:
Notes:			
Period From:	To:	# Sold:	Sold to Date:
Notes:			
Period From:	To:	# Sold:	Sold to Date:
Notes:			
Period From:	To:	# Sold:	Sold to Date:
Notes:			
Period From:	To:	# Sold:	Sold to Date:
Notes:			

Importance / Components of Market Research

The key components of market research for new home sales:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Words of Wisdom

“When the product is right, you don’t need a great marketer.”
- Lee Iacocca

Sources for Market Research

While available information varies from area to area, possible sources for your market research include:

- *AI Research Tools*
- *Appraisers*
- *Boards of Realtors*
- *Building Departments*
- *Chamber of Commerce*
- *Civic Organizations*
- *Data Providers and Apps*
- *Financial Institutions*
- *Harvard Joint Center*
- *Home Buyers/Shoppers*
- *Libraries*
- *Lenders*
- *Local Builders Associations*
- *Multiple Listing Service*
- *N.A.H.B.*
- *N.A.R.*
- *New Homes Publications*
- *New Home Sales People*
- *Newspapers/Magazines*
- *Relocation Organizations*
- *Planning Commissions*
- *Public Utility Companies*
- *Real Estate Agents*
- *Real Estate Research Groups*
- *Recorder's Office*
- *School Boards*
- *State Department of Commerce*
- *Surveys/Focus Groups*
- *Title Companies*
- *Tourism Bureaus*
- *Trade Publications*
- *Universities*
- *Urban Land Institute*
- *U.S. Census Bureau*
- *Zoning Departments*

Development of Marketing Strategies

Steps in the development of marketing strategies:

1.

2.

3.

4.

5.

6.

7.

Words of Wisdom

“One of the keys to being a great marketer is knowing that your product is right.”

- Dennis Walsh

Market Segments - Who Are They?

1. YINGLES

Characteristics

Hot Buttons

2. MINGLES

Characteristics

Hot Buttons

3. YOUPLES

Characteristics

Hot Buttons

4. DINKS

Characteristics

Hot Buttons

5. YUPPIES

Characteristics

Hot Buttons

6. PUPPIES

Characteristics

Hot Buttons

7. GUPPIES

Characteristics

Hot Buttons

Market Segments - Who Are They?

8. GRAMLIES

Characteristics

Hot Buttons

9. MAMLIES

Characteristics

Hot Buttons

10. WOOPIES

Characteristics

Hot Buttons

11. GO-GO'S

Characteristics

Hot Buttons

12. SLO-GO'S

Characteristics

Hot Buttons

13. NO-GO'S

Characteristics

Hot Buttons

Generating Qualified Prospects

The foundation for most effectively generating qualified prospects is _____.

The marketing efforts must be directed to _____.

How do buyers find new home information?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Primary Sources of Prospects

Prospecting and marketing activities are _____ in their overall effect.

The Primary sources of prospective new home buyers can be divided into three major categories:

1.

-
-
-
-
-

2.

-
-

3.

Generating Street Traffic

The following options are listed for your consideration in planning your marketing efforts directed at generating street traffic.

Advertising

- *SM and Online Marketing*
- *Local Newspapers*
- *Real Estate Publications*
- *New Homes Guides*
- *Direct Mail, Email, Text*
- *Literature Distribution*
- *Radio*
- *Television*
- *Satellite Displays*
- *Special Event Sponsorship*

Signage

- *Entry/Parking*
- *Temporary Directional*
- *Permanent Directional*
- *Home Sites*
- *Billboards/Benches*
- *Buses/Taxis*
- *Vehicles/Trailers*
- *Human Billboards*
- *Flags/Balloons*
- *Model Homes*

• On-Site Marketing/Public Relations

- *Grand Openings*
- *Groundbreaking*
- *Seminars*
- *Special Events*
- *Model Homes*
- *Parties/Festivals*
- *Small Group Programs*
- *Awards/Contests*
- *Press Releases*
- *Charity Events*

New Home Advertising Concepts

Our goal in our resale advertising is _____.

Our goal in new home advertising is _____.

Concepts for effective advertising:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Words of Wisdom

“If you think advertising doesn’t work, consider the millions of Americans who now think that yogurt tastes good.”

- Joe L. Whitley

Generating Referrals

Highly successful builders and top new home sales representatives consistently realize 30-70% of their business from personal and past customer referrals.

The keys to maximizing referrals:

1.

2.

-

-

-

-

-

3.

-

-

Cooperative Broker Involvement

Cooperative broker involvement is important because:

1.

2.

3.

4.

Cooperative Broker Programs

The keys to creating successful cooperative broker programs include:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Your Goal:

Other agents must consider working with you to be

_____!

Cooperative Broker Programs

Some ideas for elements of a cooperative broker program include:

- *On-site presentations, training events*
- *Broker office presentations, event sponsorship*
- *Broker newsletter/email drip campaigns*
- *Participation responsibilities/policies*
- *Broker/prospect registration guidelines, portals*
- *Information packages or portals*
- *Stepped commissions for repeat business*
- *Parties/special events*
- *VIP programs, award recognition programs*
- *Special promotions/contests*
- *Thank you notes/gifts*
- *Flyers, text or email updates*
- *Promotion to relocation specialists*
- *Broker satisfaction survey*
- *Social media advertising campaigns*

Creative Marketing

Creative Marketing

Creative Marketing

Fear of Closing

The #1 reason salespeople fail to close successfully is _____!

1. _____

2. _____

3. _____

4. _____

Sales is

“Hard Sell” is

You must believe in

_____ & _____ to overcome your fear!

Defining Closing

When it comes to making major decisions,
most people are more comfortable

_____.

Closing is

What are the barriers we must overcome in the closing process?

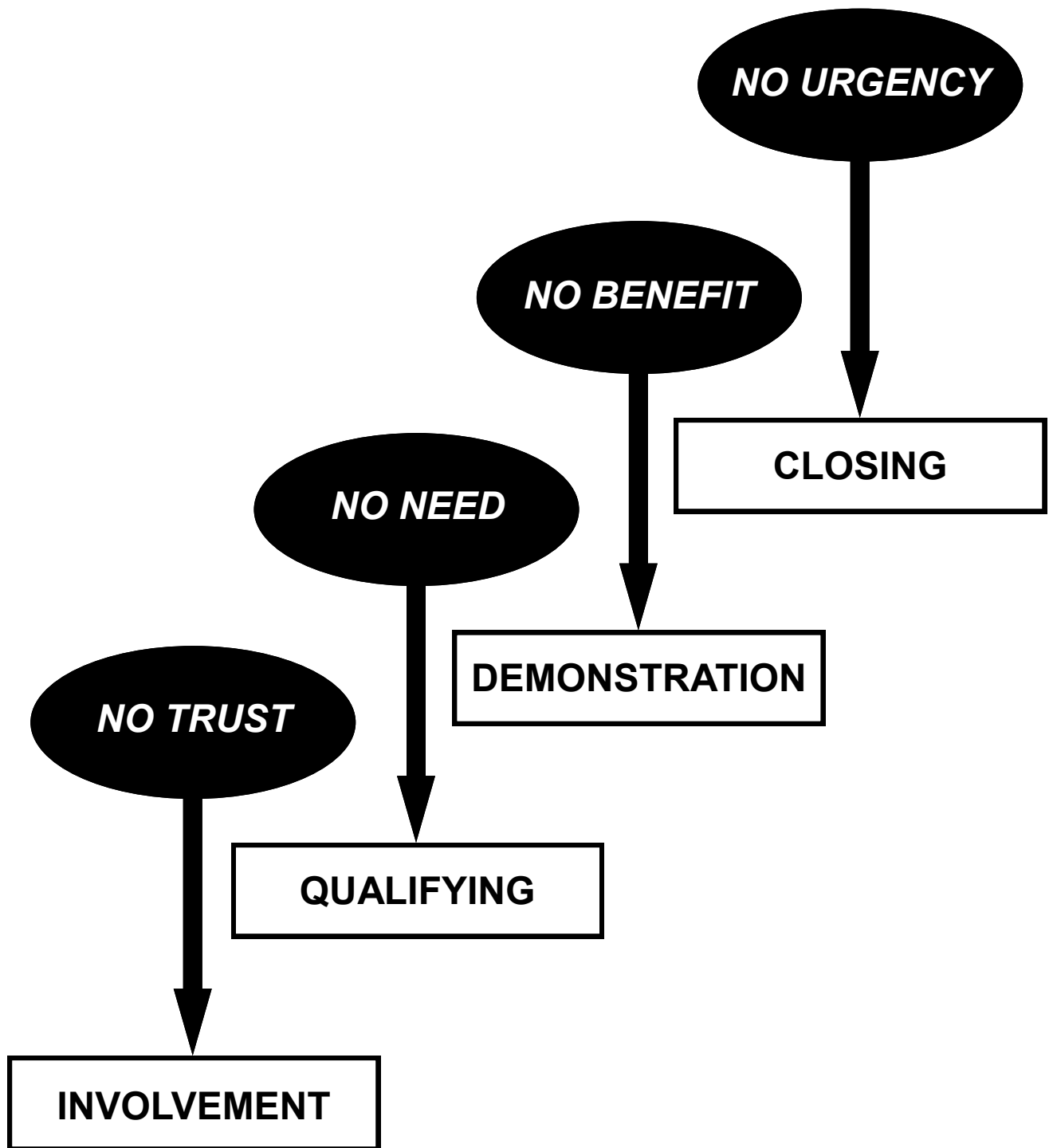
1. NO _____

2. NO _____

3. NO _____

4. NO _____

Overcoming Closing Barriers



Counselling Approach to Involvement

Involvement is the process of building _____.

The four “R’s” of Involvement:

1. Developing _____.
2. Defining our _____.
3. Establishing mutual _____.
4. Building a trusting _____.

Words of Wisdom

***“People don’t care how much you know
until they know how much you care!”***

First Impressions

How long does it take our customers to develop an impression of us?

In our greeting, we should:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Involvement Dialogue

"Hello... Thanks for stopping to see us today!"

*"My name is _____; and yours?"
"What do you like to be called?"*

"You look familiar to me... are you from the area?"

"Are these yours? Hi kids... Are you going to buy mom and dad a new home today?"

"We take kids as down payment, so if we've got the right home here for you, you're in good shape."

"So what brings you out to see us today?"

"Have you been considering a new home purchase for long?"

"How have things been going so far in your new home search?"

"Can you tell me a little about your current situation?"

"There's a lot of information to sort out when your shopping for a new home, isn't there?"

*"People tell me all the time that it can sometimes get a little overwhelming."
"Have you experienced that?"*

"I can understand it... When I first began working in new home sales, I had so much to learn."

"Fortunately, we have specialized training available through our company that teaches us all about helping people through the process of buying a new home."

Involvement Dialogue

"I've been helping people make home buying decisions for years, and I feel my success is based on a very simple idea.... I see my role as first helping you sort out your needs and your options... Then, based on my experience, helping you make the decisions that are the best for you."

"I'm proud to have earned a national designation as a Certified New Home Specialist™... The training I've received has been a great advantage to me in helping my customers make their best decisions."

"To help you the best, however, I need to learn as much as possible about your ideas, needs, and any concerns you may have."

"The more you can share with me.... the better we can sort out what's really the best for you."

"If we can work together to identify what's most important to you in a new home, I'm confident I can help you put together a combination that's right for you!"

"Would you allow me an opportunity to help you sort things out?"

"Before we start looking at floor plans or construction features, could we sit down and discuss some of your ideas and specific needs?"

"That way, I think we can zero in on what's really the best for you."

"Before we get any further, why don't we take a look at what you've seen, your time table, your budget parameters and so on... Then, I think we can best put together a "battle plan" to help you make your best decisions."

Involvement Worksheet

How would you attempt to create some involvement in these situations?

1. *"Hi... We're just looking."*
2. *"We'd just like to take a look through...We're really not in the market for a new home at this time."*
3. *"We'd rather look through the model by ourselves... We don't have much time today."*
4. *"Could I have a brochure? My wife asked me to stop and pick up a few for her to study over the weekend."*

Qualifying

Stop “Telling” — Start “Selling!”

What you know doesn't matter until you understand

_____.

Qualifying is a process of _____

to determine _____.

We qualify our prospects on two levels:

1.

2.

Words of Wisdom

***William James, known as the “father of modern-day psychology”
said “People tend to buy on emotion, and justify with facts.”***

and

***“At the moment something becomes personal,
it becomes interesting.”***

Areas of Qualification

In new home sales, we must qualify our buyers in the areas most important to their decision-making.

The major areas of qualification are:

1. *Needs & Motivations*
2. *Timing & Commitment*
3. *Location & Home Site*
4. *Design & Quality*
5. *Builder & Sales Representatives*
6. *Costs & Financing*

Open Questions

Active Questions

Qualifying Dialogue

Needs & Motivations

“What prompted you to begin looking for a new home?”

“Can you tell me a little about your current situation?”

“How would you describe your current home?”

“What do you like?”

“What would you change?”

“What are some interests and hobbies of you and your family?”

“How would you describe your life-style?”

Qualifying Dialogue

Timing & Commitment

"Are you thinking of making a move soon if you find the right home?"

"If you found a new home you like, would there be any obstacles to your move?"

"How soon do you plan to make a decision about a new home?"

"Have you made any arrangements regarding the sale of your present home?"

"Is there any other information you feel you will need to help finalize your decisions?"

Qualifying Dialogue

Location & Home Site

"Do you work close to our community?"

"Are you familiar with this area?"

"Have you seen any other communities that appeal to you?"

"Regarding a home site, what are your specific interests?"

"Are you familiar with the amenities and special features of our community?"

Qualifying Dialogue

Design & Quality

"What style of home appeals the most to you?"

"Do you prefer a formal or more informal feeling in your home?"

"How do you feel the quality of our workmanship compares to other homes you've seen?"

"What are your most important concerns regarding the design of your new home?"

"What can you tell me about the style and design features of the new home you could envision calling your own?"

Qualifying Dialogue

Builder & Sales Team

"Are you familiar with our builder?"

"Are there any other builders you are considering at this time?"

"Have you ever bought a new home before? ...What was your experience?"

"What are some of the things you feel are important to you as you select a builder?"

"Are you aware of our reputation for customer service? Would you like to learn more about the special features of our Customer Service Program?"

Qualifying Dialogue

Builder & Sales Team

"Are you familiar with our builder?"

"Are there any other builders you are considering at this time?"

"Have you ever bought a new home before? ...What was your experience?"

"What are some of the things you feel are important to you as you select a builder?"

"Are you aware of our reputation for customer service? Would you like to learn more about the special features of our Customer Service Program?"

Qualifying Dialogue

Costs & Financing

"Have you established a firm budget figure for your new home?"

"Do you have a good idea of the current resale value of your present home?"

"Would you like to take a closer look at how the numbers might work out for you on this home?"

"Are you aware of some of the various financing options currently available?"

"Have you gotten any firm price quotations from other builders at this point?"

New Home Demonstration

Demonstration is the process of

Our buyers are tuned into station “WIIFM”.

Effective demonstration is important to:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Critical Path Demonstration

While it's important to be flexible in your demonstration and adapt the sales process to the needs and interests of your customers, it's also important to have a plan.

A well-organized demonstration covers the following areas:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Sales Center Design and Demonstration

Areas of a Sales Center:

A

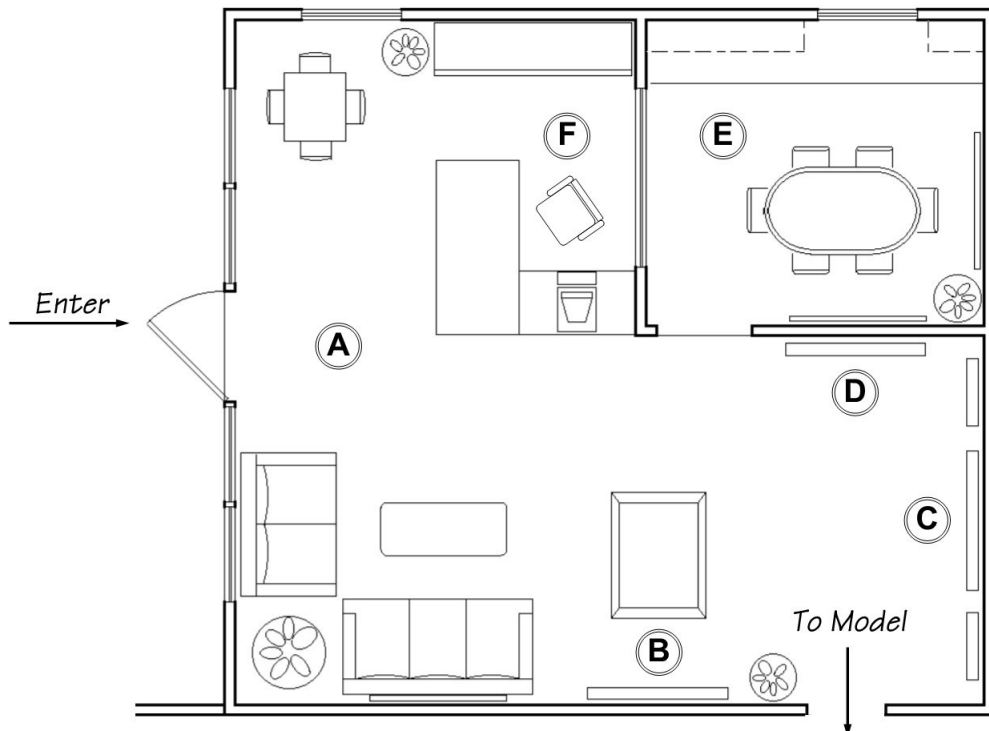
D

B

E

C

F



Additional Demonstration Ideas

Suggestions that will enhance your demonstration:

- ◆ *Plan and rehearse your demonstration.*
- ◆ *View the home through the eyes of potential buyers.*
- ◆ *Decorate sales center to feel warm and comfortable, not formal.*
- ◆ *Don't put brochures, study plans or other handouts out in open.*
- ◆ *Have play area with games, toys and activities for kids.*
- ◆ *Bake pies or cookies, spray scents or burn candles for smells of home.*
- ◆ *Play music or have a movie playing on a television for sounds of home.*
- ◆ *Maximize effects of lighting - don't block light sources.*
- ◆ *Always offer soft drinks or snacks to make people feel more at home.*
- ◆ *Position yourself for maximum impact in each room.*
- ◆ *Don't crowd small spaces - follow prospects.*
- ◆ *Use brand names, specifications, and correct terminology.*
- ◆ *Practice demonstrating for involvement - appliances, windows, controls, etc.*
- ◆ *Don't rush - give buyers time to get involved.*
- ◆ *Don't talk too much - target your conversation to their areas of interest.*
- ◆ *Ask them their opinions of design, decorating, and other features.*
- ◆ *Excuse yourself for a moment from current conversations to greet new visitors.*
- ◆ *Feature lifestyle displays with pictures of real people.*
- ◆ *Show pictures of your builder, developer, yourself, and others in your organization.*
- ◆ *Use full 1/4 scale drawings and high quality renderings to sell from plans.*
- ◆ *Help them visualize themselves, their possessions and lifestyle in the new home.*
- ◆ *Do your best to help them make their best decisions!*

Words of Wisdom

"The sale is not made until the buyer mentally moves in."
- Dave Stone

Demonstration Dialogue

"This is going to be such a wonderful neighborhood ... I can't think of a better place to watch your family grow... how do you think your kids would like living here?"

"Are you familiar with the quality features of Pella Windows?... Here, why don't you give this a try... I'd like you to see how easily they tilt in to clean."

"We are so fortunate to have such talented craftsmen... Feel the finish on this mantle... Isn't that beautiful?"

"Based on using this plan, and your ideas for your yard... I'd like to show you a home site that would be perfect for you."

"Do you decorate your home for the holidays?... Wouldn't this great room decorate beautifully?"

"Do you spend much time in your kitchen? Imagine how much you could enjoy cooking in this one!"

"How do you like that wall of windows?... When the sun sets, this room fills with beautiful red-orange light... Wouldn't that be a great way to end your day?"

"Almost all of our customers love this expansion room... How do you think you might use this space?"

"You mentioned you enjoy woodworking... Would you set up your work shop in the garage, or the basement?... Why don't we take a look at how you might lay it out."

"This would approximate the front line of the house ... So this would be the view from your kitchen and eating area... And look at the privacy you'd enjoy behind that line of trees... Don't you think this site is perfect for you?"

Effectively Selling Quality

What is Quality?

Balance of Quality = _____

The four *Elements of Quality*:

- 1.
- 2.
- 3.
- 4.

New Home Design Process

Three major factors influence the design process:

- 1.
- 2.
- 3.

Residential design options:

- 1.
- 2.
- 3.
- 4.

Words of Wisdom

“We shape our buildings — thereafter they shape us.”
- Sir Winston Churchill

Organizing Design Information

Buyers should organize design information into three categories:

- 1.
- 2.
- 3.

More design advice:

- 1.
- 2.
- 3.
- 4.

Survey Says

***Professional Builder Magazine, in its 18th Annual Consumers Survey, asked home shoppers:
“What do you dislike most about your present home?”
The #1 response was “Lack of excitement.”***

The Counselling Approach to Closing

Closing is the process of helping people finalize purchase decisions that are good for them.

In new home sales, we must close on each of the areas of buyers' decision making:

1. *Needs & Motivations*
2. *Timing & Commitment*
3. *Location & Home Site*
4. *Design & Quality*
5. *Builder & Sales Representatives*
6. *Costs & Financing*

In the "Counselling Approach" to sales, you must close _____ before you close _____!

Handling Objections

Is it really an objection?

What appears to be an objection may actually be:

1.

2.

3.

4.

Handling objections:

1.

2.

3.

4.

5.

Objection Techniques

Techniques for overcoming objections:

1.

2.

3.

4.

5.

Prepare to overcome objections:

1.

2.

3.

4.

Objection Dialogue

"Could you tell me a little bit more about your concern?"

"What specifically bothers you?"

"Why do you feel that way?"

"I can understand why that would bother you..."

"Others have felt the same way..."

"I reacted the same way when I first heard that... But after looking into the situation further, here's what I found."

"Does that eliminate your concern?"

"Does that make sense to you?"

"Based on that explanation, do you think you could be comfortable here?"

Objection Worksheet

How would you attempt to overcome the following objections?

1. *"We were really looking for a much larger lot."*
2. *"I've never heard of this builder... I think we need to talk to some other builders before we decide what to do."*
3. *"The location is just too far from where we work."*
4. *"The bedrooms seem much too small, especially at this price."*
5. *"Gizmo Homes is offering much more house for the money... Plus they were willing to negotiate their prices."*
6. *"This subdivision is so new... I think we'll wait to see how things shape up here."*
7. *"Over at Sump Pump Acres, the homes are priced at a lower cost per square foot."*

Creating Urgency

Creating a sense of urgency is usually essential in securing a commitment from our buyers.

Urgency is based on two emotions:

- 1.
- 2.

We can establish urgency through:

- 1.
- 2.
- 3.
- 4.
- 5.

Words of Wisdom

***“Nothing is more convincing to buyers
than evidence that others want the same thing.”
- Harvey McKay***

The Language of Closing

Tie Downs

Trial Closing Questions

Closing Questions

Opening Dialogue

Bridging Dialogue

Closing Dialogue

Tie Downs

"The location of our community seems perfect for you, don't you think?"

"This design really utilizes space effectively, doesn't it?"

"A beautiful view of the sunset would certainly be a great way to end your day, wouldn't it?"

"With all the hobbies and activities your family is involved in, this bonus room could be fantastic, couldn't it?"

Trial Closing Questions

"Which of these elevations do you prefer?"

"Do you feel this bedroom layout would work well for you?"

"Which kitchen layout do you like best? ... With or without the island?"

"If we could organize everything necessary for a spring start, do you think a late summer completion would make sense for you?"

Closing Dialogue

Openings

“I want you to know what's most important to me is helping you make the decisions that are best for you.”

“I really enjoy helping people put together the right combination to meet their needs... It's a great feeling to help you make a change that can have such a positive impact on your life.”

“Tell me,... where do you feel you'd like to be a year from now?”

“Many people tell me they have passed up some excellent opportunities often because they don't have a complete understanding of the details ... Why don't we sit down and take a closer look at the timing and costs involved?”

“... I think you'll find we can make the process of planning and building your new home much easier than you might have thought.”

Closing Dialogue

Closing Questions

“This location is great, the site is beautiful, and the design is perfect for your family... if we could finalize some of the details today, you could be enjoying your new home before the holidays! ... Why don't we put together a timetable to get things started?”

“I'd really hate to see you lose that beautiful home site... it really seems perfect for you and your family... Why don't we put a reservation on it, and then start to finalize some of the other details.”

“The site is ideal, you both seem to really like the Barrington plan... and if we could get started right away, the timing would work out great for you!! If we can finalize things within your budget, would you like to proceed?”

“I realize it's difficult to finalize your thinking on some of the options. In the meantime, why don't we review the steps in the process preparing for actual construction?”

“I'm really excited that we have the right combination here for you - if we can get some of the initial paperwork started today, we'll be able to nail down your pricing before the spring cost increases... would you like to sit down and get started?”

Closing Dialogue

Closing Questions

“This location is great, the site is beautiful, and the design is perfect for your family... if we could finalize some of the details today, you could be enjoying your new home before the holidays! ... Why don't we put together a timetable to get things started?”

“I'd really hate to see you lose that beautiful home site... it really seems perfect for you and your family... Why don't we put a reservation on it, and then start to finalize some of the other details.”

“The site is ideal, you both seem to really like the Barrington plan... and if we could get started right away, the timing would work out great for you!! If we can finalize things within your budget, would you like to proceed?”

“I realize it's difficult to finalize your thinking on some of the options. In the meantime, why don't we review the steps in the process preparing for actual construction?”

“I'm really excited that we have the right combination here for you - if we can get some of the initial paperwork started today, we'll be able to nail down your pricing before the spring cost increases... would you like to sit down and get started?”

Closing Dialogue

Bridges

“What concerns are holding you back at this point?”

“I understand your concerns, and your feelings about wanting to think things over, but I feel this is a great opportunity for you, and I'd hate to see you lose it!”

“What exactly do you feel is holding you back from a decision today?”

“I understand what a difficult decision this can be... I help people through the decision-making process every day.”

“Lots of people feel the same way, but even when everything is right for you, it's often uncomfortable because it represents a significant change.”

“But like so many of my customers say after they've made the decision, ‘I wonder why I waited so long’.”

“Let me ask you this... on a scale of one to ten, where ten means you're ready to proceed, where do you stand?”

“What do you feel it would take to move you to a ten?”

“I'd love to see this happen for you! ... How can I help you to ten?”

Closing Worksheet

How might you respond to these situations? How would you move them toward a closing attempt?

1. *"Everything sounds good, but we'd like to think it over."*
2. *"Your estimate for monthly payments is \$300.00 higher than what we're paying now — We just can't afford this."*
3. *"The timing just won't work! Gizmo Homes can move us in two months sooner — We're going to have to work out something with them."*
4. *"Thank you for your help, but we're just not ready to make a commitment now. We'd like to shop some other builders and then we'll get back to you."*

CERTIFIED NEW HOME SPECIALIST™ PROSPECT PROFILE SUMMARY

STATUS	
<input type="checkbox"/> +	Positive
<input type="checkbox"/> -	Negative
<input type="checkbox"/> ?	Needs Follow-up

**NEEDS
&
MOTIVATIONS**

**TIMING
&
COMMITMENT**

**LOCATION
&
HOME SITE**

**DESIGN
&
QUALITY**

**BUILDER
&
SALES REPS**

**COSTS
&
FINANCING**

**TRUST
NEED
BENEFIT
URGENCY**

Community: <i>Heartland Estates</i>		Source: <i>Homes Guide, Signage</i>	
Names: <i>Byers, John (Jack) & Meg</i>		Home Phone: <i>555-0000</i>	
Address: <i>222 Lovely Lane</i>		Rent / Own:	
His Occupation: <i>ABC Sales Company</i>		Work Phone: <i>555-0001</i>	
Her Occupation: <i>XYZ Service Company</i>		Work Phone: <i>555-0002</i>	
Email: <i>John : jbyers@customer.net Meg: meg@customer.net</i>			
Buyer Representative: <i>None</i>		Phone:	
New Home Style: <i>Traditional - 2 story</i>		Price Range: <i>\$450 - 500K</i>	
Features: <i>3 Bedrooms, 1st floor master, 1st floor office, Open plan!</i>			
Timing: <i>Start construction March/April - Fall completion</i>			
1 st Visit	<i>10/14</i>	2 nd	3 rd
			4 th
			5 th

STATUS	NOTES
<input type="checkbox"/> +	<i>Knows Dr. Wilson - S/L 42</i>
<input type="checkbox"/>	
<input type="checkbox"/> +	<i>Location - Work</i>
<input type="checkbox"/> +	<i>School system</i>
<input type="checkbox"/> -	<i>Prefers 1 1/2 - 2 acres wooded</i>
<input type="checkbox"/> +	<i>Walk-out Basement</i>
<input type="checkbox"/> -	<i>Highway Noise</i>
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/> +	<i>Wants custom design</i>
<input type="checkbox"/> +	<i>1 story - open</i>
<input type="checkbox"/> +	<i>Brick exterior</i>
<input type="checkbox"/> +	<i>Home office</i>
<input type="checkbox"/> +	<i>1st floor laundry rm.</i>
<input type="checkbox"/> +	<i>3 car garage</i>
<input type="checkbox"/> ?	<i>Geothermal heating - costs, warranty, literature</i>
<input type="checkbox"/>	
<input type="checkbox"/> -	<i>Concerned about timing, construction delays</i>

CERTIFIED NEW HOME SPECIALIST™ DEMONSTRATION ORGANIZER

AREA

STATUS

NOTES

PAGE _____

STATUS

Positive
 Negative
 Needs
 Follow-up

**NEEDS
&
MOTIVATIONS**

**TIMING
&
COMMITMENT**

**LOCATION
&
HOME SITE**

**DESIGN
&
QUALITY**

**BUILDER
&
SALES REPS**

**COSTS
&
FINANCING**

**TRUST
NEED
BENEFIT
URGENCY**

FEATURES 8' x 12' - hall 4' wide **BENEFITS** _____

Ceramic Tile - "Marazzi" low maintenance

- Wire mesh installation much stronger

Velux skylights - Wood - Aluminum clad 5 year warranty

- Insulating glass, tinted energy savings

- Step flashing system no leaks

Thermatru "Fiberclassic" entry door 5 year warranty

- urethane foam core - R-15 energy efficient

Dual closets over 7' closet rod

"Hampton" style railings - oak much stronger

Security system - prewired also in master

QUESTIONS _____

Do you entertain often? Large or small groups?

Do you like painted woodwork? Traditional or contemporary

Do you currently have a security system? Skylights?

CERTIFIED NEW HOME SPECIALIST™ DEMONSTRATION ORGANIZER

AREA

STATUS

NOTES

PAGE _____

STATUS

Positive
 Negative
 Needs
 Follow-up

**NEEDS
&
MOTIVATIONS**

**TIMING
&
COMMITMENT**

**LOCATION
&
HOME SITE**

**DESIGN
&
QUALITY**

**BUILDER
&
SALES REPS**

**COSTS
&
FINANCING**

**TRUST
NEED
BENEFIT
URGENCY**

FEATURES _____

BENEFITS _____

QUESTIONS _____

CERTIFIED NEW HOME SPECIALIST™ DEMONSTRATION CHECKLIST

GENERAL FEATURES	ENTRY	DINING ROOM
<input type="checkbox"/> ARCHITECTURAL DESIGN <input type="checkbox"/> ARCHITECTURAL DETAILING <input type="checkbox"/> HISTORICAL FEATURES <input type="checkbox"/> SITE ORIENTATION <input type="checkbox"/> ENERGY CONSERVATIONS <input type="checkbox"/> SOUND ATTENUATION <input type="checkbox"/> FOUNDATIONS <input type="checkbox"/> FLOOR CONSTRUCTION <input type="checkbox"/> WALL CONSTRUCTION <input type="checkbox"/> ROOF FRAMING <input type="checkbox"/> WINDOWS <input type="checkbox"/> DOORS <input type="checkbox"/> STAIR CONSTRUCTION <input type="checkbox"/> HARDWARE <input type="checkbox"/> PAINTING • DECORATING <input type="checkbox"/> FIREPLACES	<input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FURNITURE PLACEMENT <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> CEILING TREATMENTS <input type="checkbox"/> MOLDINGS <input type="checkbox"/> WINDOWS • DOORS <input type="checkbox"/> LIGHTING <input type="checkbox"/> CLOSETS <input type="checkbox"/> SPECIAL FEATURES	<input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FURNITURE PLACEMENT <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> CEILING TREATMENTS <input type="checkbox"/> MOLDINGS <input type="checkbox"/> WINDOWS • DOORS <input type="checkbox"/> BUILT-INS <input type="checkbox"/> LIGHTING <input type="checkbox"/> SPECIAL FEATURES
OTHER AREAS	FAMILY ROOM	BEDROOMS
<input type="checkbox"/> ATTIC AREAS <input type="checkbox"/> EXPANSION ROOMS <input type="checkbox"/> PORCH <input type="checkbox"/> SUNROOM <input type="checkbox"/> WORKSHOP <input type="checkbox"/> ACCESSORY BUILDINGS <input type="checkbox"/> OFFICE <input type="checkbox"/> MEDIA ROOM <input type="checkbox"/> IN-LAW SUITE <input type="checkbox"/> HOBBY ROOM <input type="checkbox"/> SWIMMING POOL	<input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FURNITURE PLACEMENT <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> CEILING TREATMENTS <input type="checkbox"/> MOLDINGS <input type="checkbox"/> WINDOWS • DOORS <input type="checkbox"/> FIREPLACE <input type="checkbox"/> BUILT-INS <input type="checkbox"/> LIGHTING <input type="checkbox"/> SPECIAL FEATURES	<input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FURNITURE PLACEMENT <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> CEILING TREATMENTS <input type="checkbox"/> MOLDINGS <input type="checkbox"/> CLOSETS • SHELVING <input type="checkbox"/> BUILT-INS <input type="checkbox"/> LIGHTING <input type="checkbox"/> SPECIAL FEATURES
	PAGE ONE	MECHANICAL SYSTEMS
		<input type="checkbox"/> PLUMBING <input type="checkbox"/> ELECTRICAL <input type="checkbox"/> HVAC <input type="checkbox"/> SPECIAL MECHANICALS

CERTIFIED NEW HOME SPECIALIST™ DEMONSTRATION CHECKLIST

BATHROOMS	SERVICE AREAS	KITCHEN
<input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> CEILING TREATMENTS <input type="checkbox"/> MOLDINGS <input type="checkbox"/> WINDOWS • DOORS <input type="checkbox"/> LIGHTING <input type="checkbox"/> CLOSETS <input type="checkbox"/> BUILT-INS <input type="checkbox"/> FIXTURES • FAUCETS <input type="checkbox"/> CABINETRY <input type="checkbox"/> COUNTER SURFACES <input type="checkbox"/> MIRRORS <input type="checkbox"/> VENTILATION <input type="checkbox"/> SPECIAL FEATURES	<input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> WINDOWS • DOORS <input type="checkbox"/> LIGHTING <input type="checkbox"/> STORAGE <input type="checkbox"/> CABINETRY <input type="checkbox"/> COUNTER SURFACES <input type="checkbox"/> APPLIANCES <input type="checkbox"/> PLUMBING FEATURES	<input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> CEILING TREATMENTS <input type="checkbox"/> MOLDINGS <input type="checkbox"/> WINDOWS • DOORS <input type="checkbox"/> LIGHTING <input type="checkbox"/> CLOSETS <input type="checkbox"/> BUILT-INS <input type="checkbox"/> FIXTURES • FAUCETS <input type="checkbox"/> CABINETRY <input type="checkbox"/> COUNTER SURFACES <input type="checkbox"/> APPLIANCES <input type="checkbox"/> VENTILATION <input type="checkbox"/> ELECTRICAL OUTLETS <input type="checkbox"/> SPECIAL FEATURES
<b style="text-align: center;">BASEMENT <input type="checkbox"/> INSULATION <input type="checkbox"/> BASEMENT WINDOWS <input type="checkbox"/> FOOTING • DRAINAGE <input type="checkbox"/> MECHANICALS	<b style="text-align: center;">LIVING ROOM <input type="checkbox"/> LOCATIONS • TRAFFIC FLOW <input type="checkbox"/> DIMENSIONS <input type="checkbox"/> FURNITURE PLACEMENT <input type="checkbox"/> FLOORING <input type="checkbox"/> WALL TREATMENTS <input type="checkbox"/> CEILING TREATMENTS <input type="checkbox"/> MOLDINGS <input type="checkbox"/> WINDOWS • DOORS <input type="checkbox"/> FIREPLACE <input type="checkbox"/> BUILT-INS <input type="checkbox"/> LIGHTING <input type="checkbox"/> SPECIAL FEATURES	<b style="text-align: center;">EXTERIOR FEATURES <input type="checkbox"/> SIDING <input type="checkbox"/> ROOFING <input type="checkbox"/> DECKS • PATIOS <input type="checkbox"/> STONE OR BRICK <input type="checkbox"/> DRAINAGE SYSTEMS <input type="checkbox"/> GRADING <input type="checkbox"/> LANDSCAPING <input type="checkbox"/> UTILITIES <input type="checkbox"/> PROPERTY LINES
<b style="text-align: center;">GARAGE <input type="checkbox"/> STORAGE <input type="checkbox"/> FLOOR DRAINS <input type="checkbox"/> O.H. DOORS <input type="checkbox"/> OPERATORS	PAGE TWO	

Effective Follow Up

Effective follow-up is critical to our success in:

1. Turning _____ into _____.

2. Turning _____ into _____.

Keys to effective follow-up:

1.

2.

3.

We must follow-up until they

_____ or _____!

Follow Up System

To maintain consistent contact:

1.

2.

-
-
-
-
-
-

3.

4.

Organizing your follow-up system:

1.

2.

3.

4.

Quality Customer Service

The primary goal of quality customer service is

_____.

What are the advantages?

1.

2.

3.

4.

What is customer ***satisfaction***?

What is ***quality***?

Achieving Customer Satisfaction

Concepts for achieving customer satisfaction:

1. *Understand What Your Customer Wants*
2. *Work to Establish Realistic Expectations*
3. *Strive to Exceed Their Expectations*
4. *Deliver on Your Promises*
5. *Stay in Touch - Follow Through*
6. *Let Customers Help You Deliver Quality Service*
7. *Everyone in the Organization Helps*
8. *Use Systems, Not Just Smiles*
9. *Measure Performance and Satisfaction*
10. *“Kaizen”*

Words of Wisdom

“There is only one boss. The customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else.”

- Sam Walton, founder, Wal-Mart

Quality After Sale Service

As a new home sales “*Counsellor*,” servicing your customer after the sale is an important part of your role.

Areas of After-Sale Service include:

1. *Finalizing Contracts, Financing, and Approvals*
2. *Providing Design and Selection Guidance*
3. *Assisting in Budgeting and Cost Control*
4. *Keeping Buyers Informed*
5. *Anticipating and Resolving Problems*
6. *Preparing for Move-In and Closing*
7. *Assisting in the New Home Orientation*
8. *Providing Emotional Support*

Words of Wisdom

“There's one thing that I do that a lot of salespeople don't — and that's believe the sale really begins after the sale - not before.”

- Joe Girard

CERTIFIED NEW HOME SPECIALIST™ BRICK & STONE SELECTION FORM

Job Location:
Builder:
Contact Info:
Customer:
Contact Info:
Supplier:
Contact Info:

SELECTIONS

Location of Material:	Quantity:
Type of Material:	Cost:
Notes:	
Location of Material:	Quantity:
Type of Material:	Cost:
Notes:	
Location of Material:	Quantity:
Type of Material:	Cost:
Notes:	
Location of Material:	Quantity:
Type of Material:	Cost:
Notes:	

AUTHORIZATION

Selection Date:	Order Date:	Delivery Date:
Received By:		Date:
Customer Authorization:		Date:
Notes:		

CERTIFIED NEW HOME SPECIALIST™ ROOFING SELECTION FORM

Job Location:
Builder:
Contact Info:
Customer:
Contact Info:
Supplier:
Contact Info:

SELECTIONS

Type of Material:		
Underlayment:		
Quantity:	Color:	Cost:
Notes:		
Flashing:		
Quantity:	Color:	Cost:
Notes:		
Drip Edge:		
Quantity:	Color:	Cost:
Notes:		

AUTHORIZATION

Selection Date:	Order Date:	Delivery Date:
Received By:		Date:
Customer Authorization:		Date:
Notes:		

CERTIFIED NEW HOME SPECIALIST™ SIDING & GUTTERS SELECTION FORM

Job Location:
Builder:
Contact Info:
Customer:
Contact Info:
Supplier:
Contact Info:

SELECTIONS

Siding Material:		
Quantity:	Color:	Cost:
Window Trim:		
Quantity:	Color:	Cost:
Corner Trim:		
Quantity:	Color:	Cost:
Shutters:		
Quantity:	Color:	Cost:
Notes:		

AUTHORIZATION

Selection Date:	Order Date:	Delivery Date:
Received By:		Date:
Customer Authorization:		Date:
Notes:		

CERTIFIED NEW HOME SPECIALIST™

CABINET & COUNTERTOP SELECTION FORM

Job Location:
Builder:
Contact Info:
Customer:
Contact Info:
Supplier:
Contact Info:

SELECTIONS

Location:	Layout Attached:
Cabinets:	Countertops:
Location:	Layout Attached:
Cabinets:	Countertops:
Location:	Layout Attached:
Cabinets:	Countertops:
Location:	Layout Attached:
Cabinets:	Countertops:
Location:	Layout Attached:
Cabinets:	Countertops:
Location:	Layout Attached:
Cabinets:	Countertops:
Location:	Layout Attached:
Cabinets:	Countertops:

Total Costs for above including delivery and sales tax:
Installation by:

AUTHORIZATION

Selection Date:	Order Date:	Delivery Date:
Received By:		Date:
Customer Authorization:		Date:
Notes:		

CERTIFIED NEW HOME SPECIALIST™ APPLIANCE SELECTION FORM

Job Location:

Builder:

Contact Info:

Customer:

Contact Info:

Supplier:

Contact Info:

SELECTIONS

APPLIANCE	COLOR	COST

Total Costs for above including delivery and sales tax:

Installation by:

AUTHORIZATION

Selection Date:

Order Date:

Delivery Date:

Received By:

Date:

Customer Authorization:

Date:

Notes:

CERTIFIED NEW HOME SPECIALIST™ FLOORING SELECTION FORM

Job Location:

Builder:

Contact Info:

Customer:

Contact Info:

Supplier:

Contact Info:

SELECTIONS

LOCATION	MATERIAL	QUANTITY	COST

Total Costs for above including delivery and sales tax:

Installation by:

AUTHORIZATION

Selection Date:

Order Date:

Delivery Date:

Received By:

Date:

Customer Authorization:

Date:

Notes:

CERTIFIED NEW HOME SPECIALIST™ LIGHTING FIXTURES SELECTION FORM

Job Location:
Builder:
Contact Info:
Customer:
Contact Info:
Supplier:
Contact Info:

SELECTIONS

LOCATION	FIXTURE	QUANTITY	COST

Total Costs for above including delivery and sales tax:
Installation by:

AUTHORIZATION

Selection Date:	Order Date:	Delivery Date:
Received By:		Date:
Customer Authorization:		Date:
Notes:		

Dennis Walsh Walk-Through System

This system is effective for builders large or small.

Walk-Throughs:

1. *Walk-Through Prior to Drywall*
2. *Preliminary In-House Walk-Through*
3. *New Home Orientation Walk-Through*
4. *30-60 Day Follow-Up Walk Through*
5. *Eleven Month Final Walk-Through*

The New Home Orientation

Our goals at the New Home Orientation include:

1. *Customer Satisfaction*
2. *Familiarize Owners with New Home*
3. *Verify Completeness*
4. *Develop "Punch List"*
5. *Establish Realistic Expectations*
6. *Finalize Paperwork and Approvals*

The New Home Orientation package can include:

- ◆ *Home Orientation Checklist*
- ◆ *Punch List*
- ◆ *Copy of Warranty*
- ◆ *Warranty Service Requests*
- ◆ *Owner's Manuals*
- ◆ *Service Contracts*
- ◆ *Acceptance Documents*
- ◆ *Home Maintenance Kit*
- ◆ *"Welcome Home" Letter*
- ◆ *House Warming Gift*
- ◆ *Moving Checklist*
- ◆ *Change of Address Cards*
- ◆ *Packing Labels*
- ◆ *Merchant Coupons*
- ◆ *Community Services Info*
- ◆ *Utility Connection Info*

Selling Your Services to Builders

The process of selling your sales and marketing services to a builder can be broken down into six steps:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

How to connect with builders:

- 1.
- 2.
- 3.
- 4.
- 5.

CERTIFIED NEW HOME SPECIALIST™ BUILDER MARKETING PROFILE

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COMPANY ORGANIZATION

Identify individuals and their responsibilities in the following areas:

Management:

Office Staff:

Field Supervision:

Sales / Marketing:

Other:

MANAGEMENT GOALS AND PERSPECTIVES

Describe how the owners and management view the following:

Current Status of Company:

Future Goals of Company:

CERTIFIED NEW HOME SPECIALIST™ BUILDER MARKETING PROFILE

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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:

CERTIFIED NEW HOME SPECIALIST™ BUILDER MARKETING PROFILE

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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:	

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 Options:
Home Styles:			Price Range:
Competitors:			
Community Features:			
Builder's Homes Available:			
Summary:			

CERTIFIED NEW HOME SPECIALIST™ BUILDER MARKETING PROFILE

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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:

CERTIFIED NEW HOME SPECIALIST™ BUILDER MARKETING PROFILE

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BUYER PROFILES – PAST _____ YEARS

AGE

____ % 20 – 29

____ % 30 – 39

____ % 40 – 49

____ % 50 – 59

____ % 60 +

MARKET SEGMENT

____ % First Time

____ % Move-Up

____ % Empty Nester

____ % Single

____ % Family

INCOME

____ % Under \$30,000

____ % \$30 - \$50,000

____ % \$50 - \$75,000

____ % \$75 - \$100,000

____ % \$100,000 +

FLOOR PLAN

____ % 1 Story

____ % 1½ Story

____ % 2 Story

____ % Split-Level

____ % Bi-Level

SQUARE FOOTAGE

____ % Under 2,000

____ % 2,000 – 3,000

____ % 3,000 – 4,000

____ % 4,000 – 5,000

____ % 5,000 +

ARCHITECTURAL STYLE

____ % Traditional

____ % Contemporary

____ % Transitional

____ % Single-Family

____ % Multi-Family

Previous Residence Locations:

Reasons For Buying From Builder:

Buyers Perceptions of Builder:

CERTIFIED NEW HOME SPECIALIST™ 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:

Reference:

Relationship:

Perceptions:

Reference:

Relationship:

Perceptions:

Reference:

Relationship:

Perceptions:

Reference:

Relationship:

Perceptions:

Reference:

Relationship:

Perceptions:

Involvement Dialogue With Builders

“I've been looking forward to meeting you — you have an excellent reputation.”

“The homes you build are beautiful! I love the home you're building on River Road!”

“I'm working with more and more buyers interested in new homes and I'm looking for a great builder to work with.”

“I'd like to learn more about your company and how you work with new home buyers.”

“Most builders find it to their advantage to subcontract many of the construction activities ... Have you ever considered subcontracting your sales and marketing activities?”

“At (your company name), we recognize that new home sales are very different than selling existing homes.”

“As a result, we have a specialized New Home Sales Division.”

“We represent many of the finest builders in this area.” (Offer client list and testimonials)

“Would you like to learn more about our specialized builder services and how they might benefit you?”

“I'm proud to be designated as a Certified New Home Specialist™. I've completed comprehensive training on all aspects of new home sales and marketing ... I'd love an opportunity to discuss ways we could help you increase your sales and profits!”

Broker / Builder Responsibilities

In a builder/broker relationship, responsibilities of brokers and associates may include the following:

- ◆ Comprehensive New Home Sales Training
- ◆ Certified New Home Sales Specialist
- ◆ Loyalty to Builder
- ◆ Market Research and Planning
- ◆ Builder and Product Knowledge
- ◆ Area and Community Knowledge
- ◆ Product and Design Research
- ◆ Develop Advertising and Promotion
- ◆ Develop Sales Literature
- ◆ Coordination of Promotional Events
- ◆ On-Site Signage
- ◆ Promotion to Broker Network
- ◆ Prospecting for Referrals
- ◆ Promotion to Relocation Network
- ◆ Competitive Shopping and Evaluation
- ◆ Maintain Sales Environment
- ◆ On-Site Staffing
- ◆ Prospect Registration
- ◆ Traffic and Sales Reporting
- ◆ Sales Presentation and Follow-up
- ◆ Price quotation and coordination
- ◆ Processing Purchase Agreements
- ◆ Coordination of Financing
- ◆ Product and Color Selections
- ◆ Coordination of Production Information
- ◆ Customer Service During Construction
- ◆ Processing Change Orders
- ◆ New Home Orientation
- ◆ Processing Acceptance and Closing
- ◆ Coordination of Warranty Service
- ◆ Ongoing Evaluation of Marketing Effort
- ◆ Ongoing communication with Builder
- ◆ Professional Attitude and Appearance
- ◆ Assist Existing Home Sales
- ◆ Move-in Coordination
- ◆ Follow-up Buyer Satisfaction Survey

In a builder/broker relationship, responsibilities of the builder often include the following:

- ◆ Consistent Communication with Sales Team
- ◆ Orientation Product, Pricing, Systems
- ◆ Provide Current Pricing, Specification Info
- ◆ Update Site Availability Status
- ◆ Coordinate & Supervise Construction
- ◆ Build in Conformance with Plans and Specs
- ◆ Secure all Approvals and Inspections
- ◆ Keep Job Sites Safe and Clean
- ◆ Provide Quality Customer Service
- ◆ Conduct New Home Orientation
- ◆ Promptly Complete Punch List Items
- ◆ Provide One Year Written Warranty
- ◆ Service Warranty Requests Promptly
- ◆ Refer all Prospects to Sales Team
- ◆ Work to Maintain Customer Satisfaction
- ◆ Follow-Through Promptly on Communications

Cost Value Continuum Concept



All Cost / No Value

\$1 Cost = \$2 Value

Construction Cost – Home Value Continuum



Keys to Success in New Home Sales

Words of Wisdom

***“You can’t build a reputation on
what you’re going to do.”***

- Henry Ford

Congratulations!

Congratulations on Your Completion of the Certified New Home Specialist Course!

Remember to have these completed worksheets available when you're ready to proceed with the open-book CNHS Designation Test. If you need assistance please call or text 949-514-5272.

