Sales System

* Initial Contact
  + Email
  + Facebook
  + Phone Call
* Phone Contact
  + Fill out Lead Sheet
* Initial Meeting
  + One Sheet
  + Ask questions from New House Take Off Sheet
  + Discuss wants and needs
  + Educated guess of Price Per Square Foot
* Design Meeting
  + Schedule Designer and Customer with Brian’s schedule
  + Have Customer’s information
  + Copies for Designer
  + Determine if Designer is charging Price per Square foot or By the Hour
  + Invoice for ½ of the Blueprints
  + Design Process
    - Monitor Communication between Designer and Customer until design of home is complete
  + PPIN is gotten from Customer if a sight plan is done by designer
* Mark Up Meeting
  + Send plans out for printing
  + Advise Customer plans are done via email or phone call
  + Schedule meeting between Customer and Brian to meet in the office
  + Get printed plans from vendor
  + Have second invoice for customer
  + Have Customer’s file ready for meeting (any printed communication & Lead Sheet)
  + Brian to review options for new home with Customer
* Quoting
  + Take plans back to vendor to be scanned and emailed back to Ofc Mgr or Production Mgr
  + Email out to Subcontractor’s list
    - List the part of the county the home will be built
    - Attach the blueprints to the email
    - Give a date of when you want the bids back to you (Usually a week)
  + Send out the email
  + Next day verify the subcontractors have received the email with attached Blueprints via phone call
    - As bids come back in, print out and mark off Subcontractor’s list as received
    - If deadline date is upon, call and ask for bid to be sent over
    - Once all bids are in and gathered into the folder, give to Brian or Production Mgr
* Pricing
  + Brian or Production Manager reviews quotes by filling out Quote Sheet and verified
  + Information taken from Quote Sheet and placed into Quick Books system
    - Information is double checked
    - Information is also entered into the customer quote sheet from Quick Books
  + Price is generated for actual cost to build home from Quick Books
  + Areas are highlighted of where money can be saved
* Present Estimate
  + Customer is contacted via email that the price of the home is in and meeting is scheduled to review
  + Brian reviews with customers
    - If price is too high – areas are noted where money can be saved, requoting process is sent back out if needed
    - Once requote prices are back, Brian or Production Mgr reenter into the computer to get the home in a more acceptable price point for customer
    - Revised Price is reviewed via phone conservation, meeting or email by BTA Staff and customer
* Final Sale
  + Send email to vendor to get printed copy of Blueprints
    - Pick up and have ready to give to customer
  + Ofc Mgr gets PPIN number from Customer to have legal description of land (if not already gotten for designer)
  + Once Customer is happy with price, Office Mgr writes the contract
    - Customer’s legal names are needed
    - PPIN number is needed for legal description of land
    - Draw schedule is needed
    - Quote is need
    - 2 Copies of Blueprints
    - Brian reviews prior to meeting customer for signatures
  + Customer meeting is scheduled to sign contract
    - 1 set of the Blueprints are signed off by the customer(s)
    - Copy of contract is given to the customer
    - Copy of the Blueprints are also given to customer
      * Ask if they want to minimize wait time by writing a $1,000.00 check to send the plans to engineer (explain it has been taking 6-8 weeks to get back from engineering company)
      * Explain this money will be credited to their contract price
        + If customer agrees, review with Brian after they leave of any minor changes that need to be made with designer
        + Send email of needed changes and once those are made, for designer to send over to engineer for approval

A copy of the changes made will be emailed back to Ofc Mgr for the file

* + - Explain that the contract and the Blueprints are what the bank needs to get the financing done.
      * Explain to customer that the bank is not to hand over the blueprints to the appraiser. They should either get from us here at BTA or the customer to “sell appraiser” on the custom features of the home to get the best appraisal value.
      * Once customer gives you a close date then you do the next steps
* Interior design
  + Fill out the construction to design form for the designer
  + Copy all bids
  + Order another set of Mark Up plans for designer
  + Call designer and tell her that new customer file is ready to be contacted
  + Email her the blueprints, customer information – phone numbers, emails and names
* Permitting
  + Get 911 address from customer
  + Get customer their “Honey Do List”
    - Pay for temp power
    - Pay for water tap, if well is not requested
    - Pay for sewer tap, if septic is not requested
      * Customer to pay for and order Perk test from Health Department
  + Call Building Department to verify if home will be in County, Planning & Zoning, or City Municipality
  + Begin filling out necessary paperwork for proper jurisdiction
    - Once copies of engineer plans are in hand, get needed copies made at vendor
  + Compile all necessary forms needed, engineered blueprints for Brian’s signature
  + He will take to necessary location for permitting
* Getting ready for construction
  + One copy will be written on with the notes from the mark up plans for superintendent
  + Make copies of all bids for superintendent, contract and contact information for customers
  + Interior designer will finalize items that will go into the home from the vendors who won the bids
    - Final design meeting will be schedule once interior designer notifies you of completion
    - Schedule with her, Brian, Superintendent and customer’s schedules
      * After meeting make Superintendent copy of entire design book
      * Original book will always stay in the office
  + Permit should be ready for pick up shortly after this final design meeting
* Time Passes – House being built
  + Communication with homeowner as needed
  + Superintendent advises Office Manager of near completion of new home
  + Ofc Mgr provide superintendent with final walk through paperwork
    - Once completed, Superintendent provides back to Ofc Mgr for closing paperwork
  + New homeowner book is made
    - * All items in sheet protectors or zipper pouch
    - All manuals for mechanical items in home
    - List of Electrician, Termite, HVAC and Plumber listed with phone numbers in case of emergency during a weekend, evening or holiday when office is closed
    - Gold Fortification
    - 2-10 booklet and informational sheet
    - New customer address labels created and placed in booklet
    - Keys to new home
    - All extra tools for plumbing fixtures, garage door openers if applicable, samples of dishwasher powder and stove top cleaner provided by superintendent
  + New homeowner thank you basket is created
* Closing of home
  + Copy and amount of invoice of last payment from Brian
    - Email that information to the customer
  + Communication with customer when appointment is arranged for final close with Ofc Mgr as liaison for BTAC
  + 2-10 Warranty applied for
  + We owe sheet for outstanding items on final walk through with customer
  + Final closing paperwork – last page of the contract with proper closing date and customer’s names typed in
  + Termite paperwork for customer
  + Explain the homeowner new booklet to them.
    - Go over items – 2-10 warranty, Emergency contacts, etc
  + Schedule a video testimony appointment in customer’s new home
  + Explain one-year builder warranty process with customer
    - If anything goes wrong, customer sends email to Ofc Mgr. No text or phone calls will be accepted
  + Note in Grey date book of closing one year out
  + On anniversary date of once year closing send out anniversary card to customer as a happy
* One Year Builder’s Warranty
  + Email is received from customer
  + Fill out Warranty form
    - Copy Warranty form and email, place one copy in Warranty notebook
  + Place Warranty item and date placed on the TO DO list
  + Give copy of claim to Superintendent
  + Follow up exactly one week from date given with Superintendent on status
  + Follow up again for completion exactly 10 days with Superintendent on status, if original paperwork is not received from Superintendent