SPECTRUM COACH
SALES I OPERATIONS

Spectrum Coach
Sales Guide

fred@spectrumcoach.com.au
www.spectrumcoach.com.au
0447 062 996

SPECTRUM COACH
SALES | OPERATIONS

Spectrum Coach
Sales Guide

Contents

Contact

0447 062 996

fred@spectrumcoach.com.au
www.spectrumcoach.com.au

1. Lead to fee flow chart

ENQUIRY MADE

LEAD GENERATED

CLOSE FOR APPOINTMENT

DISCOVERY APPOINTMENT

- Set expectations
- Build trust
- Understand lifestyle
- Discuss Options
- Close for presentation appointment

CLOSE FOR APPOINTMENT

1ST PRESENTATION APPOINTMENT

- Set expectations
- Present floor plan
- Present pricing
- Present Inclusion promotion
- Discuss promotion (if applicable)
- Plan the seed for process and fee discuss changes if any that the client may want
- Close for a further appointment to present all changes

CLOSE FOR APPOINTMENT

2ND PRESENTATION APPOINTMENT

- Set expectations
- Present floor plan changes
- Present pricing changes
- Discuss moving forward and prepare the file to order soils test and survey
- Or if further changes are required book another appointment

CLOSE FOR APPOINTMENT

3RD PRESENTATION APPOINTMENT

- Set expectations
- Present floor plan changes
- Present pricing changes
- Secure that the client is happy with service, price and product
- Discuss that we are stage of ordering soils/surveys and close

CLOSE FOR APPOINTMENT

CLOSE THE SALE

Close for file sign off appointment

2. Sales checklist

LEAD QUALIFIED	• Engagement • Relationship Building • Understanding you Clients Lifestyle • Your Creditability • More to the Next Stage
1ST APPOINTMENT MADE	
FILE PREPARED FOR CLIENT	
PLAN & PREPARE	• Land Options • House Options • Finance • Display Walk Through
1ST APPOINTMENT	• Present Options • Note any Changes • Close for Second Appointment
2ND APPOINTMENT MADE	
PLAN & PREPARE	• Pricing Options • Draw up any Changes
2ND APPOINTMENT	• Present Change & Options • Note any Changes • Plant the Seed for Sale • Close for a 3rd appointment
3RD APPOINTMENT MADE	
PLAN & PREPARE	• Pricing Options • Draw up any Changes
3RD APPOINTMENT	• Present Change & Options • Note any Changes • Close for the Sale • Overcome any Objections & Offer Solutions

3. Preliminary agreement

Date: ....

Sales Consultant: ....

Job # ....

Design: ....

Single ☐ Double ☐ Split Level ☐

Customer/s Name: ....

Customer Postal Address: ....

Site Address: ....

Customer #1 Contact Number: ....

Customer #2 Contact Number: ....

Customer/s Email Address: ....

Agreement includes: $TBA

- Initial Deposit
- Site Inspection
- Site Investigation / Soil Report
- Contour / Feature Survey
- Colour Consultation (3 - 4 hour booking)
- Electrical Plan
- Preliminary Working Drawings
- Preliminary Quotation based on above findings

TOTAL (inc GST) TBA

This deposit will become part of the 5% required at contract stage

This preliminary agreement is between (Insert Builder) and the above owner/ owners (Insert Client/s name). This agreement is applicable to residential and rural dwellings.

Signing your acceptance, the owner has authorized (Insert Builder) to execute preliminary work in absence of a Building Contract to make effort to finalise costings for a contractual outcome.

(Insert Client) & (Insert Builder) agree there is no legal binding obligation for the Client to pro-ceed to contract stage, however any costs incurred higher than the amount paid to complete the findings of these works will be at Clients expense. The deposit is to be used by (Insert Builder) to complete the works listed above.

This initial deposit is non refundable when professional services have been requested. Client will be sent a copy of the site investigations based on your chosen allotment should you de-cide not to proceed further with (Insert Builder)

The preliminary quotation is depended on the above specified design and all relevant infor-mation provided / supplied from the above investigations / selection. Any additional requests from the Client that require a major structural amendment to the proposed design may incur an additional fee. Allocated time for a scheduled Colour Consultation is maximum of 4 hours, an administration fee of $250 will be applied if this is extended over 1 hour.

By signing this agreement, client agrees that all documents supplied to (Insert Builder) fo not infringe copyright with any other builder and in such compensates (Insert Builder) of any copy-right in the preparation of these documents

Sales Consultant

Name: .... Date: ....

Customer/s

Name: .... Date: ....

Name: ....

Tax invoice

Preliminary agreement
Payment request

Date: ....

Job # ....

Design: ....

Customer/s Name: ....

Customer Postal Address: ....

Site Address: ....

Preliminary Agreement Stage 1 $...

TOTAL (inc GST) **$**...

Please make cheques payable to (Insert Builder) or directly deposit funds to the credit of our banking account:

Bank: ....

BSB: .... Account Number: ....

Reference: ....

Kind Regards,

(Insert Builder)

Signed: ....

(Signee Name)

4. Sales challenges and solutions

<table>
<tr><th>CHALLENGE</th><th>SOLUTION</th></tr>
<tr><td>Client isn’t answering emails or phone calls</td><td>Always try calling first
• if they don’t answer, leave a message and follow up with an email reiterating what you’ve said in the phone message
• Refer back to when they first enquired and what they enquired about - let’s be a little direct.

Remember to be customer centric;
• inform the client that the role of a SC or SA is to follow up, and ask if they want us to keep doing so (this applies only if they do not want to move forward)

If we have tried to contact the client 3 – 4 times, then a business decision needs to be made
• you may need to classify the sale as lost rather than continue pursuing them.</td></tr>
<tr><td>Clients has had 1 or two appointments, but doesn’t answer when you call</td><td>First of all, understand what they want, refer to why they had the appointment, and where it was left.

From there we need to find out if they are in a position to recap what was discussed at the last meeting.

Remember, always take the client back to why they enquired in the first instance.</td></tr>
<tr><td>Client says “I will think about it” when either closing for a fee</td><td>We are now in a position where the client trusts us and we have built rapport, so an appropriate response would be:

“I understand that you want to think about it, it’s the biggest purchase you will ever make, however, if I may ask what do you need to think about? Is one thing while you’re here that I can help with to put your mind at ease?</td></tr>
<tr><td>Client says “I need to see finance broker“</td><td>This is a positive sign - it tells me that that they are serious.

• If it’s for a fee, the fee becomes subject to finance for 14 days (or whatever the business deems to be a reasonable amount of time).

• If it’s too close for an appointment, ask them when are they seeing the broker, and ask for an appointment a few days after that.

• If they don’t have a broker or a date, refer them to a broker that you use.

• If there is no date booked in, tentatively book in another appointment – let them know that as a consultant, you get busy with appointments and it’s always best to book in advance.</td></tr>
</table>

CHALLENGE	SOLUTION
Client says "I am looking at other builders"	You might say to this one, "We encourage for you to look at other builders, but while doing so make sure you are comparing apples with apples". Ask them when they would be willing to get together to compare - you want to help make sure that they are getting the best deal. You should also question them about whether price or value is the most important factor to them when buying a house.
Client says "email me the information"	We have a responsibility to sit with all clients to go into detail the estimate and all the information surrounding your new home. If a client physically can not attend due to location, refer to video conferencing, or phone call.
Client says "It is too expensive"	This should not happen as you should have qualified their budget at the start and should have given them a home that suited their needs. If you are over their budget, this could be because 1. Client has beer budget, champagne taste – you might not be the builder for them. 2. Financial circumstances change – help them find a solution based upon their new budget.
You go to close for a second appointment and the client says I'll need to check with my partner	It is preferable to have an appointment without both parties. However, if you find yourself in this situation, then you can use the following: • Let's tentatively make an appointment, and you can check with you partner and get back to me. The reason I ask for this is that I can get quite busy with appointments. • I will also send you a confirmation via text to make sure it's all fine.
You go to close for an appointment and the client says "I'll let you know and get back to you".	This often happens as we have not set expectations at the start. Always tell the client what will happen so when you to close they know it's coming. If they still do not want to move to the next step, you need to ask them why. You may say something like, "Can I ask what is about today's information that may have left you uncertain about moving to the next stage?" This will help you understand the underlying issues, but ensure before you ask this question that you have earnt their trust.
You go to close for an appointment and the client says, "I'm too busy".	Offer a time that suits them, and use technology to help. In this day and age, video conferencing should be a standard part of your process.

Sales guide are as of August 2021 and can be subject to change at any given time, documents are a guide and will need to be implemented into your business based on your business policies and operations.