

# Manufacturer and Builder A Closer Working Relationship

Customer Relationship  
Management

Modular  
Drawings

Turnkey Project  
Management

Sales, Turnkey, &  
Business Training

# Customer Relationship Management

Customer  
Leads

Modular  
Pricing

Contractor  
Pricing

Sales  
Administration

Contractor  
Administration

Delivery  
& Set

Warranty  
Service

Profit  
& Loss

# CRM

## General Features - Examples

Integrated Within  
Each Network+

Data  
Accessibility+

User Help  
Menus+

Date – User  
Stamped+

Reports

Dashboards

Calendars

Integrated Across  
Two Networks+

Stage Based  
Coaching+

Internal  
Security+

Search  
Tools

Customized  
Data Views

To-Do Task  
Tracking+

To-Do Date  
Prompts+

# CRM

## Customer Leads - Examples

Contact  
Information

Current  
Situation\*

Why Build\*

When  
Move-In

Financing

Contracting  
Services\*

Visited  
Models\*

Site  
Checked\*

Alternatives\*

House –  
Style\*

House –  
Size\*

Plans Of  
Interest

Contact Log

Email  
History

To-Do Task  
Tracking\*

To-Do Date  
Prompts

# CRM

## Modular Pricing - Examples

Retail  
Prices

Custom Plan  
Design Tool

Detailed  
Specifications

Itemized  
Pricing

Excluded  
Items

Product  
Literature

Homebuyer  
Notes

Builder  
Notes

# CRM

## Contractor Pricing - Examples

Integrated w/  
Modular Pricing

Detailed  
Scope of Work

Detailed  
Specifications

Itemized  
Pricing

Excluded  
Items

Product  
Literature

Homebuyer  
Notes

Builder  
Notes

# CRM

## Sales Administration - Examples

Payment  
Details\*

Approvals  
& Permits\*

Utility  
Requirements\*

Sign-Offs\*

Energy Code  
Requirements\*

Legalese\*

To-Do Task  
Tracking\*

To-Do Date  
Prompts\*

# CRM

## Contractor Administration - Examples

Contractor Task  
Contract Price

Contractor Task  
Budgeted Cost

Contractor Task  
Received Bids

To-Do  
Task Tracking\*

To-Do  
Date Prompts



# CRM

## Delivery and Set - Examples

Module  
Sizes

Carrier  
Sizes

Staging  
Area

Roof  
System

Panelized  
Sections

Special  
Tasks

Subcontractor  
Contact Info

Subcontractor  
Shopping

To-Do Task  
Tracking\*

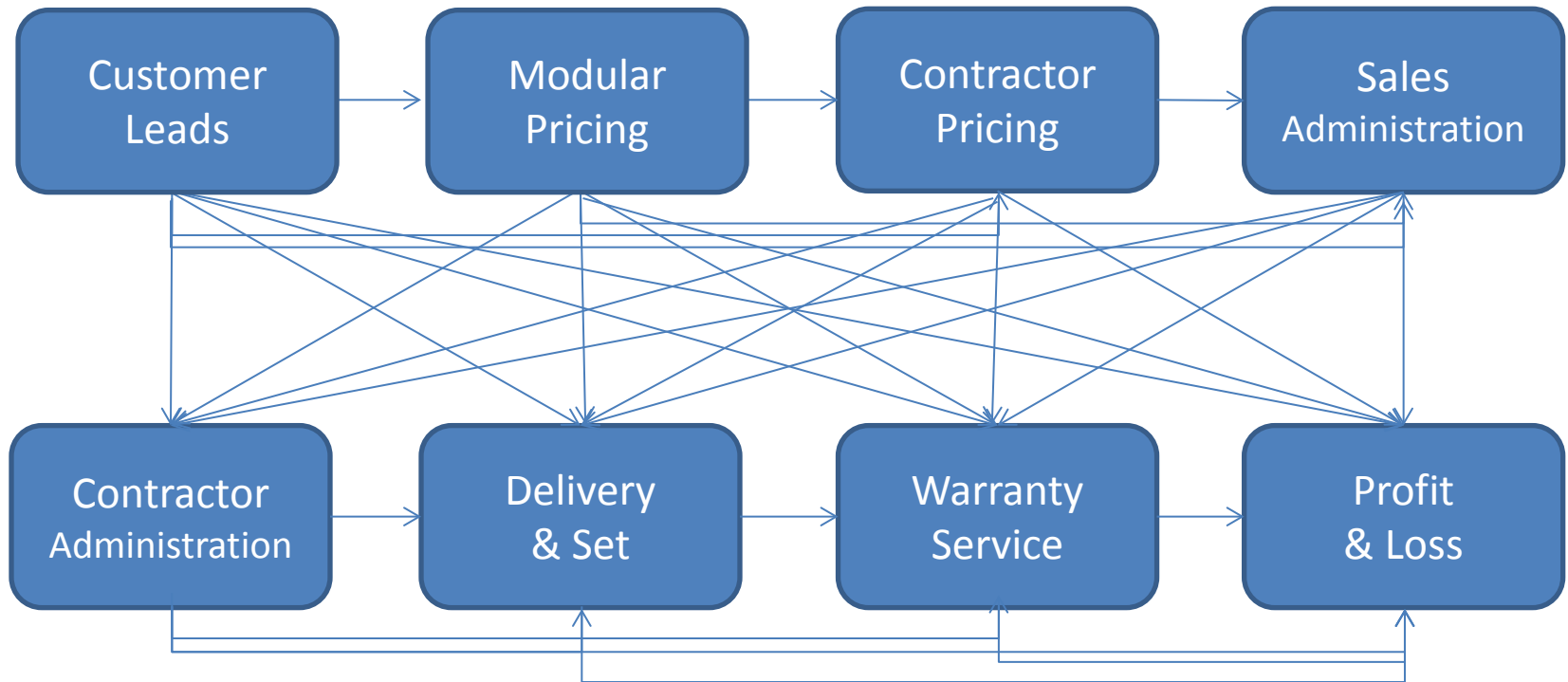
To-Do Date  
Prompts

# CRM

## Warranty Service - Examples

Description	Who Caused*	Fix Needed - Labor	Fix Needed - Materials
Report to Manufacturer	Report to Homeowner	Manufacturer Disposition	Builder Disposition
Who Correct	Reimburse to Builder	Reimburse to Owner	Work Schedule
Date Work Complete	Owner Follow-up	To-Do Task Tracking*	To-Do Date Prompts

# How the Data from Each CRM Module Is Interconnected



# Sales Training

Manual of Sales  
Best Practices

Videos & Podcasts of  
Sales Best Practices z

On-Line and In-Factory  
Classes and Webinars

# Turnkey Training

On-Line and  
In-Factory Classes  
and Webinars

Manual of  
Contractor Best  
Practices

Videos & Podcasts  
of Contractor Best  
Practices

Manual of  
Troubleshooting  
Best Practices

Videos & Podcasts  
of Troubleshooting  
Best Practices

# Four Questions

Why Is Change Needed?

Why Do We Need  
a Closer Relationship  
between Manufacturers  
and Builders?

Who Should Create The  
Systems and Tools?

How Might a Closer  
Relationship Work?