

Service Assessment Worksheets

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Document Review

Prior to the on-site visit, please forward a copy of applicable items from the list below. Carol will review these items prior to the visit and comment on them in your report. Please note: You do **not** need to include homeowner association documents.

- Company or division organizational chart
- Job descriptions: sales, design, construction, orientation, & warranty personnel
- Employee performance review form
- A sample of marketing materials/brochures from a typical community
- Website address
- Contract and standard addenda from a typical community
- Homeowner guide
- Warranty document (unless included in the homeowner manual)
- Customer meeting agendas (contract, selections, preconstruction, frame tour, orientation, warranty visit, and so on)
- Selection sheets & change order form
- Orientation forms
- Reports summarizing orientation items
- Warranty service request form
- Reports summarizing warranty items and their status
- Standard letters routinely sent to all customers
- Customer survey (blank copy)
- Reports summarizing recent surveys (most recent 12 months)
- Other written items customers see or receive that would help me understand current procedures
- Please include a map showing locations or applicable driving directions to and from the sites scheduled for visits.

If you have questions, call 719.481.6247 or email csmithhomeaddress@att.net

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On-Site Schedule

- Plan to begin this process with a short meeting at your main office to go over the schedule, make any last minute adjustments, and review locations, contact details, and any special concerns to be considered.
- The primary emphasis for the on-site schedule should be observations of interactions with actual customers. Scheduling observations with a home buyer followed by an interview the staff person who conducted the meeting works well.
- The order of the activities is irrelevant. Plan a minimum of 30 minutes for each interview with appointments from 7:30-4:30. Interview appointments may be scheduled during a working breakfast or lunch.
- If desired, the last item can be a 60- to 90-minute management meeting to discuss initial findings.
- Usually 7 to 10 days after the final report is submitted, we'll schedule a phone conference to discuss questions.

SALES

- Observe a contract appointment
- Visit sales offices and model homes
- Interview two or more sales people

MORTGAGE if applicable

- Interview a loan company representative familiar with your company

DESIGN

- Observe a design/selection appointment
- Interview members of the selection staff

CONSTRUCTION

- Observe a preconstruction conference
- Observe a frame stage tour
- Interview two or more project managers, construction superintendents, assistants, and so on

ORIENTATION

- Observe an orientation (if none is scheduled, we can conduct a “mock” orientation)
- Interview staff who conduct orientations

CLOSING

- Interview closing agent/attorney (by phone is fine)

WARRANTY

- Observe two or more warranty inspections
- Interview warranty personnel: manager, administrator, technician—as applicable

HUMAN RESOURCES

- Interview HR Manager, if applicable

OFFICE

- Interview support staff and management personnel, such as land development, architectural, purchasing/estimating, accounting, IT, legal, President or CEO, and so on.

OTHER: Any routine activity that will provide insights into your processes, such as

- Home buyer seminars
- One or more departmental meetings (time permitting): warranty, construction, design, sales
- Social media goals, objectives, status, & time table

