

LeBlanc & Associates - Field Report

Complete ▶ Rename & Save ▶ Send As Email Attachment to: mary@mleblanc.com
To Ensure Functionality, Use **Adobe Acrobat Reader** to Fill & Save Form

Sales Associate First Name: _____ Last Name: _____
Company: _____ Community: _____
Day of Week: _____ Date: _____ Start Time: _____ End Time: _____
Your First Name: _____ Last Name: _____
Your Email Address: _____
Alias Used: First Name: _____ Last Name: _____
Cover story & contact information that you provided to agent, including phone, email & address:

I. GREETING

Did Sales Associate: Quickly acknowledge your arrival? Yes No Vague
Did Sales Associate: Welcome you warmly and with enthusiasm? Yes No Vague
Did Sales Associate: Establish direct eye contact? Yes No Vague
Did Sales Associate: Introduce him/her self early in the encounter? Yes No Vague
Did Sales Associate: Ask your name early in the encounter? Yes No Vague
Did Sales Associate: Make a favorable first impression? Yes No Vague
Please provide any visual observations during the initial contact and greeting. (Direct eye contact? Handshake? Smiling? Open & friendly body language? If busy on the telephone, did the agent immediately acknowledge your presence?)

II. BUILDING RAPPORT

Did Sales Associate: Determine your family's lifestyle/interests? Yes No Vague
Did Sales Associate: Relate well to you? Yes No Vague
Did Sales Associate: Demonstrate rapport building skills? Yes No Vague
Did Sales Associate: Make you feel welcome? Yes No Vague
Please provide comments to document your ratings:

III. DISCOVERY AND QUALIFICATION

Did Sales Associate: Determine if this was your first visit? Yes No Vague
Did Sales Associate: Determine status of your home search? Yes No Vague
Did Sales Associate: Determine your timing? Yes No Vague
Did Sales Associate: Determine your motivation? Yes No Vague
Did Sales Associate: Determine your needs/preferences in a home? Yes No Vague
Did Sales Associate: Determine your needs/preferences in a home site? Yes No Vague
Did Sales Associate: Determine your family profile? Yes No Vague
Did Sales Associate: Determine if you could make a purchase decision? Yes No Vague
Did Sales Associate: Determine the status of your current residence? Yes No Vague
Did Sales Associate: Incorporate what they learned about you into the sales presentation? Yes No Vague

IV. COMMUNITY PRESENTATION

Did Sales Associate: Ask how you heard about the community? Yes No Vague
Did Sales Associate: Discuss the benefits of their community? Yes No Vague
Did Sales Associate: Discuss area services/amenities? Yes No Vague
Did Sales Associate: Explain assessments and/or tax rates? Yes No Vague
Did Sales Associate: Create uniqueness for their community? Yes No Vague
Did Sales Associate: Position their community favorably against competition? Yes No Vague
Did Sales Associate: Make you want to live in their community? Yes No Vague
Did Sales Associate: Appear well informed about their community? Yes No Vague
Comments:

V. PRODUCT PRESENTATION

- Did Sales Associate: Discuss availability? Yes No Vague
- Did Sales Associate: Discuss plans and pricing? Yes No Vague
- Did Sales Associate: Demonstrate a model home (if available)? Yes No Vague
- Did Sales Associate: Explain standard & optional features? Yes No Vague
- Did Sales Associate: Explain the benefits of those features with you? Yes No Vague
- Did Sales Associate: Appear knowledgeable about options/upgrades? Yes No Vague
- Did Sales Associate: Determine which plan best meets your needs? Yes No Vague
- Did Sales Associate: Guide you to a home site selection? Yes No Vague
- Did Sales Associate: Demonstrate a home site (if available)? Yes No Vague
- Did Sales Associate: Explain the benefits of the home site? Yes No Vague
- Did Sales Associate: Explain construction quality? Yes No Vague
- Did Sales Associate: Demonstrate good overall product knowledge? Yes No Vague
- Did Sales Associate: Explain exterior styling? Yes No Vague
- Did Sales Associate: Discuss their customer service & warranty program? Yes No Vague
- Did Sales Associate: Discuss the benefits of his/her builder? Yes No Vague

Comments:

VI. PURCHASE PROCEDURE

- Did Sales Associate: Initiate purchase procedure discussion? Yes No Vague
- Did Sales Associate: Determine your need for finance information? Yes No Vague
- Did Sales Associate: Determine your comfort level with payments/pricing? Yes No Vague
- Did Sales Associate: Offer information on their preferred lender program? Yes No Vague
- Did Sales Associate: Explain purchase deposit requirements? Yes No Vague
- Did Sales Associate: Discuss where options/upgrades could be purchased? Yes No Vague
- Did Sales Associate: Explain the overall purchase procedure? Yes No Vague

Comments:

VII. OBJECTIONS/CONCERNS

- Did Sales Associate: Listen to your concerns? Yes No Vague
- Did Sales Associate: Address your concerns in a straight forward manner? Yes No Vague
- Did Sales Associate: Offer solutions to your objections/concerns? Yes No Vague
- Did Sales Associate: Determine what other homes you were considering? Yes No Vague
- Did Sales Associate: Determine your likes/dislikes about the homes? Yes No Vague

Comments:

VIII. CLOSING

- Did Sales Associate: Create value in their homes? Yes No Vague
- Did Sales Associate: Obtain your personal involvement in a home? Yes No Vague
- Did Sales Associate: Create a sense of urgency to purchase? Yes No Vague
- Did Sales Associate: Use benefit selling language? Yes No Vague
- Did Sales Associate: Use closing statements/questions during the presentation? Yes No Vague
- Did Sales Associate: Ask if you were ready to make a purchase decision? Yes No Vague
- Did Sales Associate: Capitalize on your buying signals? Yes No Vague
- Did Sales Associate: Ask you to purchase or reserve a home? Yes No Vague
- Did Sales Associate: Determine a reason why you would not purchase? Yes No Vague
- Did Sales Associate: Attempt to schedule a return appointment? Yes No Vague

Comments:

IX. OVER-ALL SALES PRESENTATION

- Did Sales Associate: Offer you a high level of service? Yes No Vague
- Did Sales Associate: Stay focused on your needs? Yes No Vague
- Did Sales Associate: Demonstrate an organized sales presentation? Yes No Vague
- Did Sales Associate: Guide the sales process? Yes No Vague
- Did Sales Associate: Listen Well? Yes No Vague
- Did Sales Associate: Answer questions to your satisfaction? Yes No Vague
- Did Sales Associate: Create a sense of excitement about their homes? Yes No Vague
- Did Sales Associate: Utilize office sales aids effectively? Yes No Vague
- Did Sales Associate: Personalize the sales presentation to your stated needs? Yes No Vague
- Did Sales Associate: Use your name at least once during the sales presentation? Yes No Vague
- Did Sales Associate: Utilize time spent with you efficiently? Yes No Vague
- Did Sales Associate: Demonstrate a professional, courteous, sincere demeanor? Yes No Vague
- Did Sales Associate: Speak to you in a manner easy to understand? Yes No Vague
- Did Sales Associate: Ask you to complete a registration form? Yes No Vague
- Did Sales Associate: Initiate any follow up contact by telephone, mail or e-email? Yes No Vague
- Comments: (Follow-up is monitored for a two-week period from the date of the field encounter.)

Check all sales office aids agent used during your office visit:

- | | | | |
|---|--|---|--|
| <input type="checkbox"/> Community display | <input type="checkbox"/> Brochure | <input type="checkbox"/> Price list | <input type="checkbox"/> Features list |
| <input type="checkbox"/> Options list | <input type="checkbox"/> Computer | <input type="checkbox"/> Renderings | <input type="checkbox"/> Floor Plans |
| <input type="checkbox"/> Builder Story | <input type="checkbox"/> Flooring Samples | <input type="checkbox"/> Exterior color board | <input type="checkbox"/> Cabinet Samples |
| <input type="checkbox"/> Countertop Samples | <input type="checkbox"/> Out showing prop sign | <input type="checkbox"/> Touch screen monitor | <input type="checkbox"/> Other |

Check all locations where conversation took place between you and the agent:

- | | | | |
|---|---|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Outer sales office | <input type="checkbox"/> Inner sales office | <input type="checkbox"/> Models | <input type="checkbox"/> Lot Sites |
| <input type="checkbox"/> Car | <input type="checkbox"/> Golf Cart | <input type="checkbox"/> Parking Lot | <input type="checkbox"/> Other |

Sales Office Condition:

- | | | | |
|-------------------------------|------------------------------------|-------------------------------------|--------------------------------|
| <input type="checkbox"/> Neat | <input type="checkbox"/> Organized | <input type="checkbox"/> Loud Music | <input type="checkbox"/> Other |
|-------------------------------|------------------------------------|-------------------------------------|--------------------------------|

Model Condition:

- | | |
|--|--------------------------------|
| <input type="checkbox"/> Well Maintained | <input type="checkbox"/> Other |
|--|--------------------------------|

Agent Appearance/Demeanor:

- | | | | |
|---------------------------------------|-----------------------------------|---------------------------------------|--------------------------------|
| <input type="checkbox"/> Professional | <input type="checkbox"/> Positive | <input type="checkbox"/> Enthusiastic | <input type="checkbox"/> Other |
|---------------------------------------|-----------------------------------|---------------------------------------|--------------------------------|

Buyer's Impression of Agent:

- Would Purchase Would NOT Purchase

Why you would or would not purchase:

I have reviewed the ENTIRE recording to confirm it is clear, audible and easy to understand.

- Yes Length of recording in minutes: _____

I have identified the following problems with the recording: (indicate where & explain problem)

When there are problems with the recording, you must include summary notes explaining what was discussed with the agent and provide any direct quotes by the agent if possible: