



Client	KB Home
Project	MyKB Application
Date	May 06, 2016

## Research Plan – Sales Counselors

### KB Home Sales Counselor Exploratory Interview

#### Background

This interview will focus on defining the current sales counselor experience in the KB Home sales process, as well as defining areas of opportunity for the myKB application. The researchers (Sasha, Jackie, and Matt) will be conducting interviews both in-person and remotely (through video/phone call) using the guided storytelling method and critical incident technique.

#### Research Objectives

- Gain understanding of sales counselors mental models, verify, and challenge our assumptions on the sales process
- Fill in gaps in current knowledge base of the KB Home Sales experiences
- Surface pain points and gaps in the current sales experience and target areas of opportunity for the application
- Identify and document the diversity of sales processes throughout regions

#### Methodology

##### ***Guided Storytelling/Day in the Life***

To build rapport with sales counselors, the researchers will have them walk through a typical “day in the life” to establish familiarity with their routines and understand how the application would potentially fit into their behavior and practices. We are aiming to learn the sales counselors’ vocabulary around specific processes/activities in the home-sales experience, so that the application can communicate effectively and in their language.

##### ***Critical Incident Technique***

Ask individuals to describe a sales experience that either ended well or poorly. Coupled with the directed storytelling approach, our goal is to generate scenarios that cover both the positive and negative critical incidents. From here we can generate possible explanations for recommendations for improving the outcome through the MyKB application. By focusing on extreme situations, this technique also helps individuals better recall and isolate specific moments in the sales experience.

## Script – Sales Counselors

#### Introduction

- Expression of gratitude



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- Outlining of what we'd like to know, establishing "user as expert"
- Emphasis upon no "wrong" or "right" answers, and all feedback being helpful
- Openness to questions from the user around the wireframes or about the interview process at a ny time
- Ask for permission to be recorded for internal use only
- Prompt for any questions before beginning

### Talk aloud questions

- How long have you been a KB Sales Counselor?
- Have you worked for KB in any other regional division, role, or capacity?
- How many homes have you sold over your career?
- How many leads do you typically have at one time?
- Of those leads, how many turn into sales (sign purchase and options agreement)?
- Could you estimate how many customers cancel?
- Are there particular phases of the process that see higher cancellation rates? (post-Studio? Post-Construction?)
- What are some of the common reasons cited for cancellation?
- In your own words, can you describe the major milestones you outline for potential customers in the home-buying process? What are your self-defined milestones?
- Can you walk me through your KB Home sales process?

**REGISTRATION/ENGAGEMENT** (Send personal email, reviews customer preferences, floor plan sent to sales rep, sends personal templated email, accepts appt. time.)

- Describe your process for finding and identifying a lead.
- Can you tell me about the first interaction you have had with a lead? (how does outreach happen? what are common discussion/conversation topic)
- Do your colleagues follow the same process for outreach? If so, describe other processes you have encountered.
- How many times do you typically reach out to a lead?
- How do you track and manage communication with leads?
- What tools (both digital and analog) databases, materials (informational, promotional, etc.) do you use? How do you use them?
- Can you tell me about a time you were frustrated by this process? Does this happen often? (If applicable) What would have been a better solution/outcome in this scenario?
- Do your leads use the interactive floor planning tools?
- Can you describe the "ideal" interaction and process during this onboarding stage?
- Can you imagine any features that would help you reach more customers?

### SALE

- Can you walk me through a typical first visit to the sales office?
- On average, how many times does a lead visit the sales office before signing a purchase



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agreement?

- Can you recall a typical conversation you have with your leads? What are the FAQs?
- For first-time buyers, how much knowledge do they typically have about the home buying process?
- Can you tell me about a standout sales meeting with a lead? (How did you schedule your appointment, were you able to review any materials prior to your visit, how did you set customer expectations?). Why do you think this appointment went so smoothly?
- Can you recall any particularly frustrating experiences during these sales visits?
- Can you imagine any features that would help you convert the leads into sales?

### REALTORS

- How many of your leads come from realtor referrals?
- Can you describe how you handle a sales visit when a realtor brings a lead in? How does it vary from your normal process?
- How do you handle communication with the realtor?
- What is the on-going relationship like between realtors and KB's sales team?

### MORTGAGE

- Can you estimate how many of your leads use an outside lender (not HCM)?
- At what point do you begin to introduce your lead to the mortgage counselor or other financing options?
- Can you please describe the customer hand off process to mortgage counselor?
- Can you recall any particularly frustrating experiences dealing with financing during this phase? What was so frustrating about it?

### DESIGN

- At what point do you introduce your lead to the design team?
- Can you please describe the customer hand off process to the Design Consultant? (How do you set expectations?)
- Can you recall any particularly frustrating experiences dealing with design during this phase? What was so frustrating about it?
- How long does the design process typically take?
- Can you describe your interaction with the customer during this phase? What are some of the common complaints?
- What tools (digital and analog), databases, materials (informational, promotional, etc.) do you use during this phase? How do you use them?
- Do you have any recommendations or suggestions for features that would have made this process more efficient for you?

### CONSTRUCTION

- Can you describe what happens when a customer transitions from the Design Studio to Construction?



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- How long does the construction process typically take?  
Can you please describe the customer hand off/introduction to the construction supervisor?  
How do you set the construction expectations?
- What is your interaction with the construction supervisor and customer during the 12 stages of the construction process?
- Do you recall any particularly frustrating experiences dealing with construction during this phase? What was so frustrating about it? Did this change your behavior or process?
- Do you recall any particularly delightful or positive experiences dealing with construction during this phase? What behaviors and feelings took place during the incident? Did this change your behavior or process?
- What tools (digital and analog), databases, materials (informational, promotional, etc.) do you use during this phase? How do you use them?
- Do you have any recommendations or suggestions for features that would have made this process more efficient for you and your customer?
- Can you describe what happens to conclude the construction phase?

#### **MOVE IN**

- Can you walk me through the process of taking your customer from the end of the construction phase to the final move-in?
- Can you tell me about a time when you conducted a final walk through? Please tell me all the details of the new home you highlight and common questions or concerns from customers?
- What types of interactions do you have with customers following the final walk-through? (surveys, follow ups, etc).
- What tools (digital and analog), databases, materials (informational, promotional, etc.) do you use during this phase? How do you use them?
- Do you have any recommendations or suggestions for features that would have made this process more efficient for you and your customer?
- Can you tell me about a time when you were the most frustrated during this process? What were your feelings during the incident? What better solutions or outcomes you could imagine?
- Can you tell me about a time when you were the most delighted during this process? What were your feelings during the incident? Did this change your behavior or process during the Move In phase? What do you think contributed to this positive outcome?
- Do you have any recommendations that would improve the move in process?

#### **CUSTOMER SERVICE**

- Can you please walk me through how you hand off your customer to the customer service department? (How do you hand off-phone/email/in-person, how did you set customer expectations with customer service?).
- What tools (digital and analog), databases, materials (informational, promotional, etc.) do you use during this phase? How do you use them?
- Do you have any recommendations or suggestions for features that would have made this process more efficient for you and your customer?



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- Do you have any recommendations that would have made this move in process more enjoyable/efficient/transparent for you?

## WRAP UP

- In three words what are the most important things that KB Home can provide customers with during the home buying process (transparency, customer support, communication, trust, etc.)?
- Is there anything I haven't asked you about during the KB Home sales experience you would like to add?