



# The 6 Key Metrics for Managing Sales as Efficiently as Production

NAHB  
**IBS**  
TM

IBS Education

# NAHB Disclosure

The material in this education session has not been reviewed, approved, or endorsed by the National Association of Home Builders (NAHB). The topics discussed and the materials provided herein are for informational purposes only, are not intended to be an exhaustive presentation of information on a particular subject, and should not be treated as such. The speaker or speakers are not acting on behalf of or at the direction of NAHB.

NAHB specifically disclaims any liability, loss or risk, personal or otherwise, which may be incurred as a consequence, directly or indirectly, in the use or application of any of the materials presented in this or any other education session presented as part of the International Builders Show®.



**Rick Storlie**  
**New Home Sales Coach**

<https://www.linkedin.com/in/rickstorlie/>





# Why can't you grow your company?

## Issues...

1. You're only as healthy as your local market
2. Bad or no land opportunities
3. Wrong offering (plans & homesites) and/or price point
4. Too diversified (be all things to all people)
5. Toxic culture with ***no core values and purpose***
6. **Poor processes and measurables**

“Marketing without data is like driving with your eyes closed”

-Dan Zarella

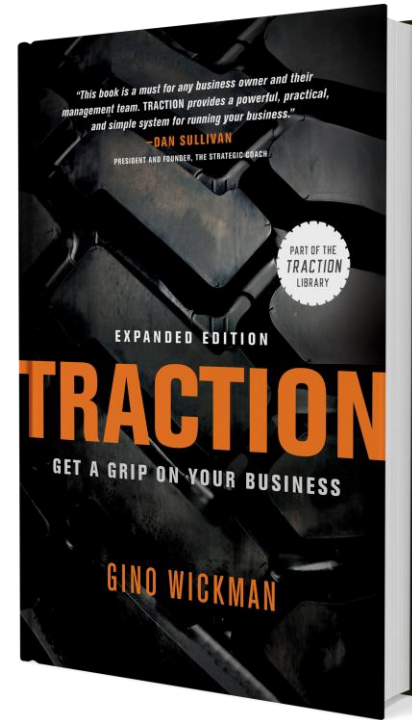


# Why is Data Important?

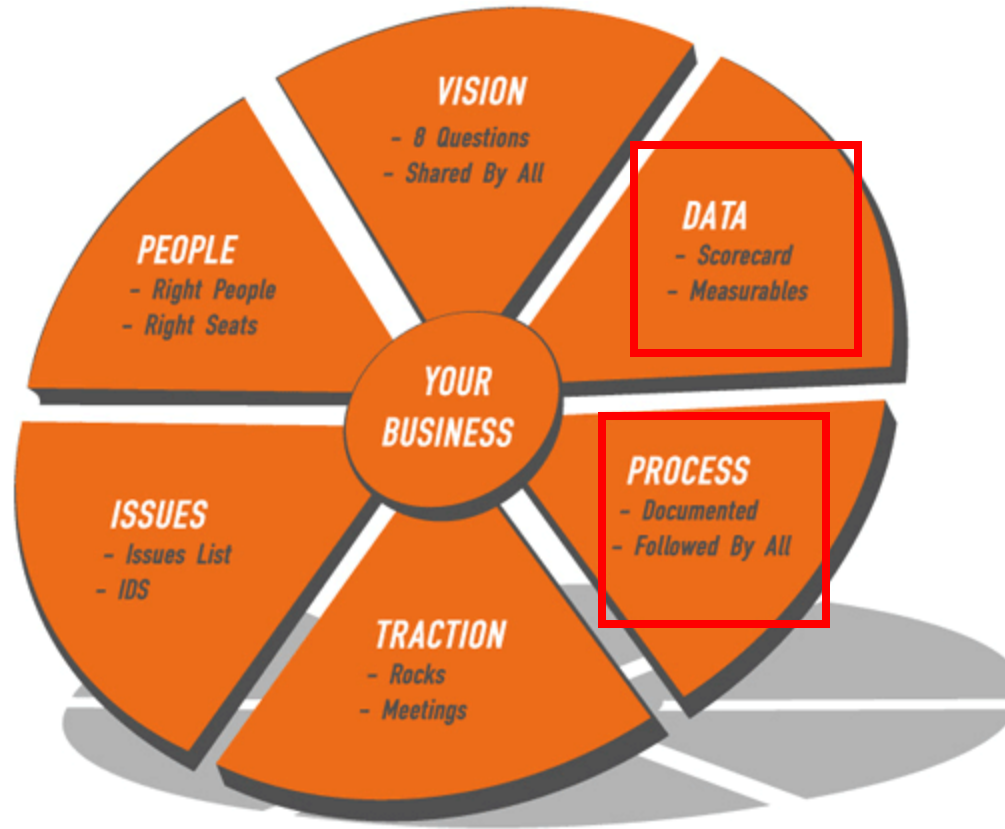
## Numbers...

1. Cut through murky subjective communication
2. Create accountability
3. Create clarity & commitment
4. Create competition
5. Produce results
6. Create teamwork
7. Help solve problems faster

**“What gets measured gets done.”**



# The EOS Model™



# If you would like actual data by builder type (i.e. custom vs. semi-custom vs. remodeler)....

Drop your business card with me...

- I'll email you a link to a PDF
- Breakdowns by builder type
- Explanations for variances
- Video tutorial walking your through the data





# Sales & Marketing Scorecard

## Areas to Track...

1. Website
2. Lead Conversions
3. Sales Funnel
4. Prospect Conversions
5. Buyer Conversions
6. Potential Sales Volume & Milestones



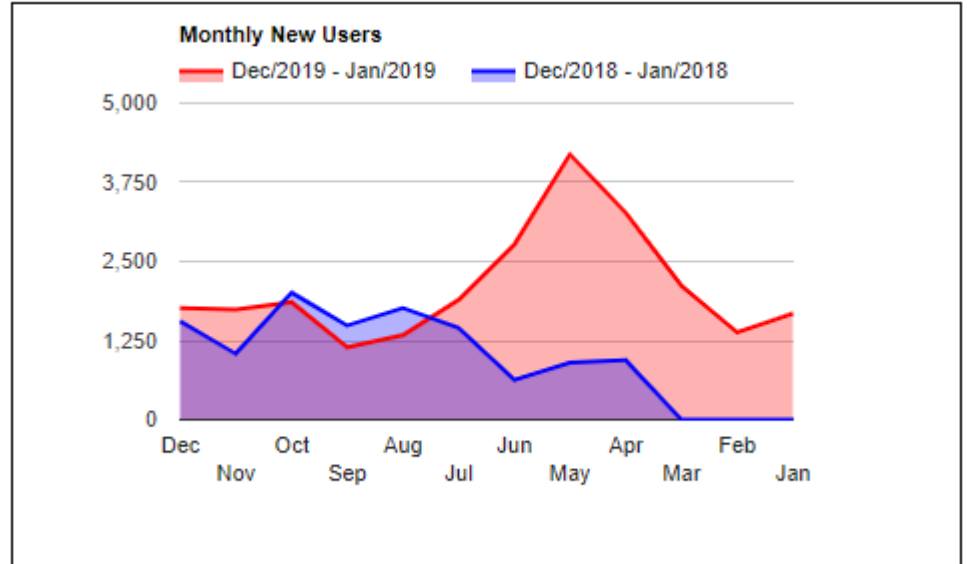
# Marketing Scorecard Measurable #1

## Avg. Custom, Semi-Custom & Design/Build Remodeling

### 1. New Users from target market state(s) 1,272 (monthly)

- A. Bounce Rate 54%
- B. Pages per session 3.6
- C. Session duration 2 min 42 sec
- D. Costs for PPC (.60 – 1.80)

Web Traffic



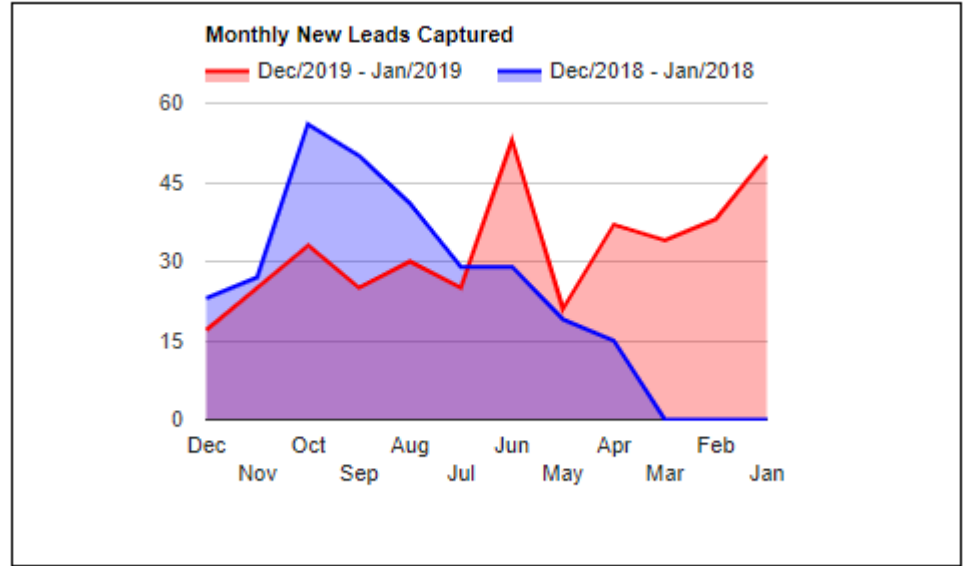
# Marketing Scorecard Measurable #2

## Avg. Custom, Semi-Custom & Design/Build Remodeling

### 2. New Leads 64 (monthly)

- A. Offline Leads 35
- B. Online Leads 29
- C. New Users to Leads 2.27%
- D. Visitors-to-Leads 43.86

### Lead Conversions



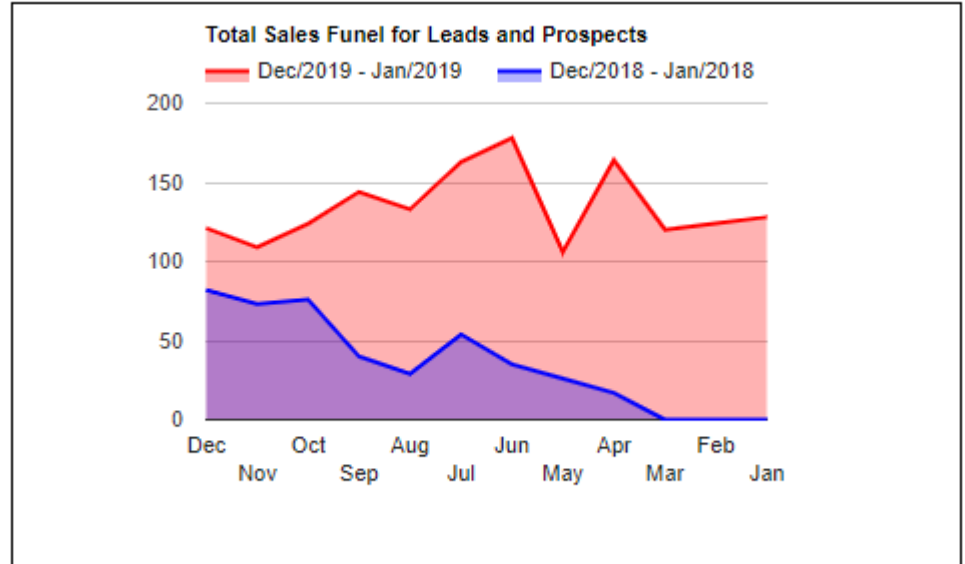
# Sales Scorecard Measurable #3

Avg. Custom, Semi-Custom & Design/Build Remodeling

3. Sales Funnel Engagement 238 (monthly)

A. Hot Opportunities 86 (36% engage deeply)

Sales Funnel (Leads and Prospects)



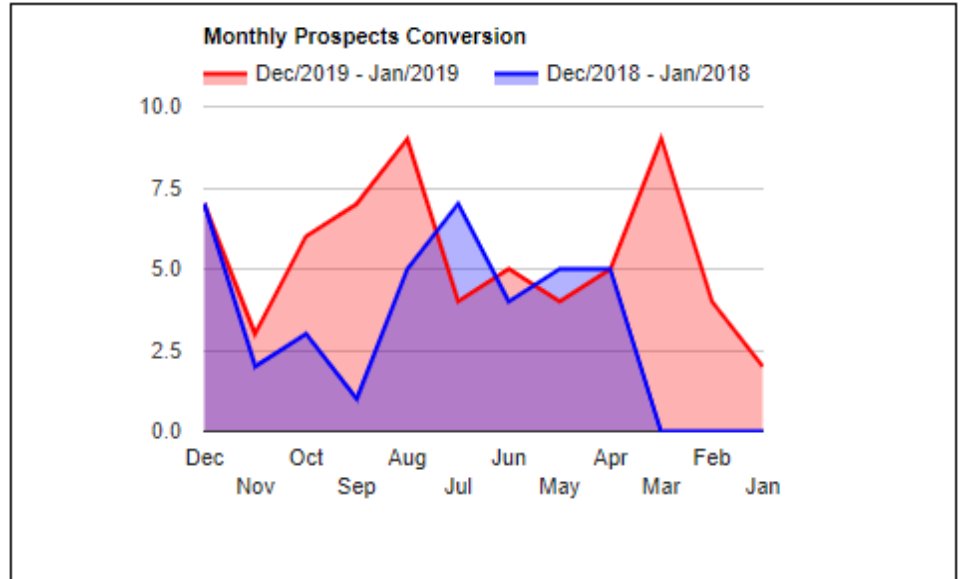
# Sales Scorecard Measurable #4

## Avg. Custom, Semi-Custom & Design/Build Remodeling

### 4. Prospect Conversion 10.1 (monthly)

- A. Leads-to-Prospect 6.43
- B. Online Prospect conversion 3.7 (36%)
  - a. Number of days 91
- C. Offline Prospect conversion 6.4 (64%)
  - a. Number of days 40

Prospects Conversion





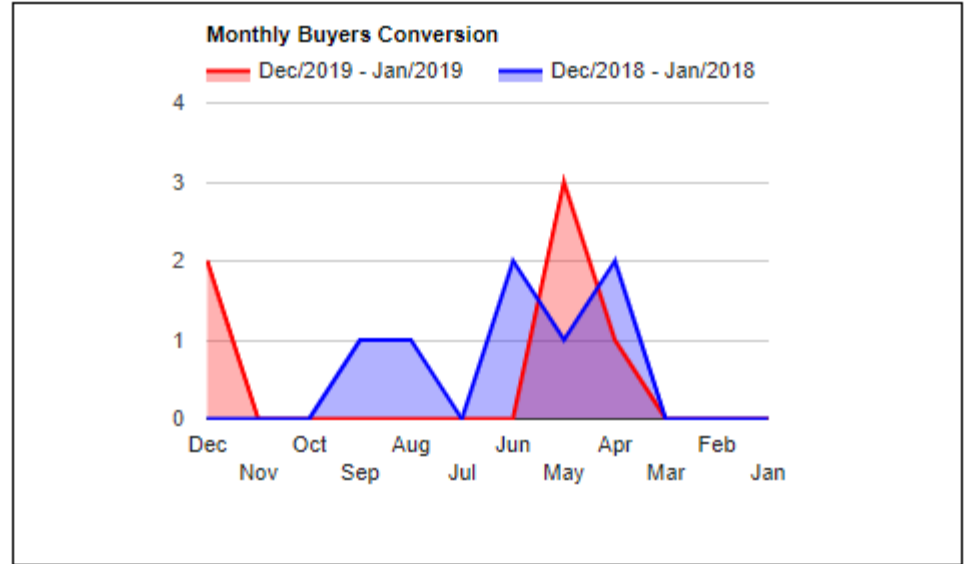
# Sales Scorecard Measurable #5

## Avg. Custom, Semi-Custom & Design/Build Remodeling

### 5. Buyer Conversion 3.4 (monthly)

- A. Prospect-to-Buyer 2.97
- B. Online Buyer Conversion 1.2 (35%)
- C. Offline Buyer Conversion 2.1 (65%)
  - a. Number of Days 86 - 395

### Buyers Conversion



# Sales Scorecard Measurable #6













## Milestones

<b>+ Add</b>	<b>Seq</b>	<b>Name</b>	<b>Description</b>	<b>Status</b>	<b>Probability</b>	<b>Probability Locked</b>	<b>Customer Type</b>
<b>+</b>	10	Qualify	Phone or face-to-face conversation to determine if Lead is a viable Prospect and will make a purchase decision in less than 12 months	Template	5%	Yes	C Customer
<b>+</b>	20	Sales Meeting/Initial Consultation	Initial Consultation/First sit down meeting	Template	10%	Yes	B Customer
<b>+</b>	30	Lot	Evaluate lot condition for construction or connect with Realtor to find lot.	Template	10%	Yes	B Customer
<b>+</b>	40	Owner Home Showing	Educational walk-through through spec or past client home.	Template	15%	Yes	B Customer
<b>+</b>	50	Pre-Build Agreement	Contract for initial pre-build work.	Template	40%	Yes	A Customer
<b>+</b>	60	Construction Agreement	Signed Construction Agreement, mutual acceptance by Prospect and builder	Template	20%	No	A Customer

# Sales Scorecard Measurable #6

+	10	Qualify	Phone or face-to-face conversation to determine if Lead is a viable Prospect and will make a purchase decision in less than 12 months	Template
-	20	Sales Meeting/Initial Consultation	Initial Consultation/First sit down meeting	Template

## Milestone Tasks

+ Add	Action	Name	Description		
10	Meeting Preparation	Send Ahead	Email Send Ahead	Template	 
20	Meeting Preparation	Confirm Meeting	Email, text or call to confirm meeting 24 hours prior- Remind Prospect to review send ahead and complete Needs, Wants and Wish list (bring with to meeting)	Template	 
30	Meet with customer	Hibbs Homes Presentation	Give Hibbs Homes presentation & overview	Template	 
40	Other	Write Up Architect Information Sheet.	Turn detailed notes from meeting into the Architect Information Sheet. Put a link in Ubix and send to the client with a wrap-up/recap email. Encourage them to add more notes and to put links to Houzz album in the notes so that we'll be ready to move forward when they are.	Template	 
50	Meeting Follow-up	Email Meeting Summary	Email summary of meeting with requested information (if any) and confirmation of next meeting.	Template	 
60	Meeting Follow-up	Thank Customer	Mail hand written thank you note.	Template	 

# Sales Scorecard Measurable #6

◇	<u>Budget</u>	◇ <u>Potential</u>	◇ <u>Percent</u>	◇ <u>Milestones</u>	◇ <u>Last Milestone</u>	◇ <u>Completed Date</u>
	\$650,000	\$97,500	15%	2 of 6	Lot	01/17/2020
	\$750,000	\$206,250	27.5%	3 of 6	Owner Home Showing	12/04/2019
	\$660,000	\$231,000	35%	4 of 6	Owner Home Showing	03/26/2019
	\$450,000	\$56,250	12.5%	2 of 6	Initial Consultation	08/21/2019
	\$550,000	\$440,000	80%	5 of 6	Pre-Build Agreement	12/04/2019
	\$800,000	\$640,000	80%	5 of 6	Pre-Build Agreement	11/01/2019
	\$950,000	\$546,250	57.5%	3 of 6	Pre-Build Agreement	08/29/2019
	\$675,000	\$540,000	80%	5 of 6	Pre-Build Agreement	10/29/2019
	\$500,000	\$62,500	12.5%	2 of 6	Initial Consultation	01/20/2020
	\$625,000	\$125,000	20%	3 of 6	Lot	11/06/2019
	\$600,000	\$165,000	27.5%	3 of 6	Owner Home Showing	12/11/2019
	\$1,500,000	\$225,000	15%	2 of 6	Sales Meeting/Initial Consultation	01/20/2020
	\$650,000	\$97,500	15%	2 of 6	Sales Meeting/Initial Consultation	01/09/2020
	\$600,000	\$90,000	15%	2 of 6	Sales Meeting/Initial Consultation	01/20/2020
	\$700,000	\$105,000	15%	2 of 6	Sales Meeting/Initial Consultation	01/20/2020
	\$550,000	\$68,750	12.5%	2 of 6	Initial Consultation	12/19/2019
	\$500,000	\$400,000	80%	5 of 6	Pre-Build Agreement	10/17/2018
	\$1,500,000	\$1,500,000	100%	6 of 6	Construction Agreement	05/20/2019
	\$700,000	\$560,000	80%	5 of 6	Pre-Build Agreement	04/17/2019
	\$500,000	\$200,000	40%	4 of 6	Owner Home Showing	12/13/2019
	<b>\$14,410,000</b>	<b>\$6,356,000</b>	<b>44.11%</b>			

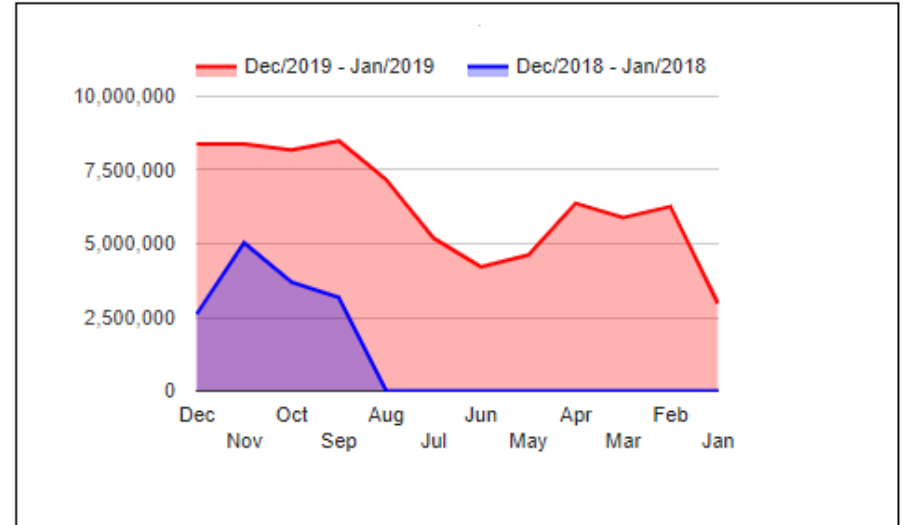
# Sales Scorecard Measurable #6

Avg. Custom, Semi-Custom & Design/Build Remodeling

## 6. Potential Sales Volume & Milestone Management (monthly)

- A. Potential sales volume \$6,356,000/44% completed sales process
- B. New Lead Follow-up +/- 95%
- C. Completed Milestone Tasks 94
- D. Completed Milestones 21

Milestone Management





# Why is Data Important?

## Creating a Sustainable Sales Process...

1. Ability to measure each part of your marketing & sales process using a scorecard/measurables
2. Your offerings have Maximum Value Perception (MVP) creating sales velocity
3. Good to great profit levels allowing you to focus on your core purpose

“What are your **core values**?”

“What is your **core purpose**?”



# What's your core purpose?



# What's your core purpose?





# What's your core purpose?



# What's your core purpose?





# What's your core purpose?



# What's your core purpose?

“No matter where I travel, I keep coming back to one of my favorite places....Robin's nest children's home in Montego Bay Jamaica. I love serving here and spending time with these kids. Jan and I are coming back in February for a couple weeks, I invite you to join us for a few days for life changing experience.”

- Mike Rygh, Facebook 10/12/19



# Thank you for your time!

---

**Rick Storlie**

New Home Sales Coach

**Coach@NHSalesCoach.com**

952-895-5566

<https://www.linkedin.com/in/rickstorlie/>



# If you would like actual data by builder type (i.e. custom vs. semi-custom vs. remodeler)....

Drop your business card with me...

- I'll email you a link to a PDF
- Breakdowns by builder type
- Explanations for variances
- Video tutorial walking your through the data

