
Sales Procedure

1. Purpose, scope, and users

The purpose of this procedure is to describe all activities related to the sales process, from recording the customer's requests to delivery of product and service.

2. Reference documents

- ISO 9001:2015 standard, clause 8.2
- ISO 14001:2015 standard, clause 8.1
- ISO 45001:2015 standard, clause 8.1
- Integrated Management System Manual
- Procedure for Service Provision
- Procedure for Measuring Customer Satisfaction

3. Sales process

3.1. Process flow

1. Customer Contacts Crystele Homes for enquiry – entered into Hubspot
2. Sales Team contacts client within 24hrs and asks qualifying questions (Allocated by Hubspot)
3. Hot Lead (Proceed under 3 Months) – Appointment

Nurture Cycle

Warm Lead	3 to 12months
Cold Lead	12months

Hot Lead Meeting – House & Land

1. Show products to the client (eg. House and Land Package)
2. Client selects product and add ons
3. A rough budget is given to the client
- 4a. A budget estimate is emailed to the client
- 4b. Any changes are sent back by the client
5. Client pays Preliminary Deposit \$2500 - to proceed to tender
6. Geositing and DP plans prepared, survey contours, DBYD etc
7. Plans drawn by designer and costed by Estimating Team
8. Tender is prepared and presented to client
9. Client required to pay Tender Deposit to Proceed.
10. Contracts prepared and signed

Hot Lead Meeting – Custom House

1. Meeting to discuss Custom House & (Possibly) Land, specification
2. Sales Consultant/Builder to review client requirements
- 2b. Client pays Preliminary Deposit \$2500 - to proceed to tender
3. Geositing and DP plans prepared, survey contours, DBYD etc
4. Plans drawn by designer and costed by Estimating Team
5. Tender is prepared and presented to client
6. Client required to pay Tender Deposit to Proceed.

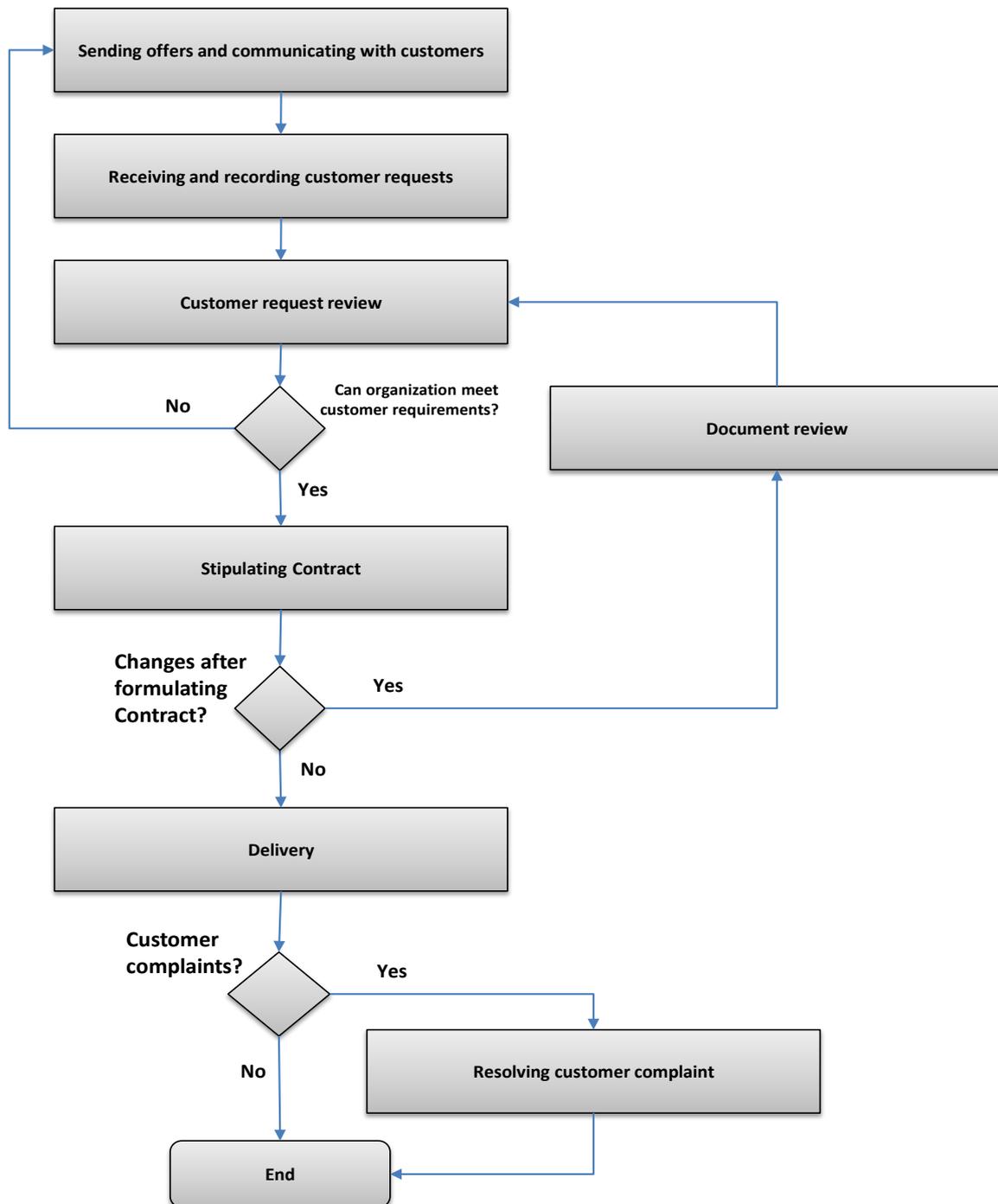


10 Sales Procedure

7. Contracts prepared and signed

Cold / Warm

1. Client put on email list
2. Sales person contacts Warm leads Monthly, and Cold Leads every 3 Months
3. Successful follow up – proceed to Hot Lead



3.2. Sending offers and communication with customers

The Marketing Team notifies known customers about products and services they are interested in or delivers offer to potential and new customers by representing to them a product or service through the company's website, phone calls, flyers, posters, Banners, Display Homes etc.

3.3. Receiving and recording customer's requests

The Sales Consultant receives the customer's requests via Hubspot and evaluates completeness and definition of requests. With a potential customer, the Sales Consultant = clarifies potential ambiguities. Determining requirements for product includes requirements for construction, requirements that the customer specified, and requirements that the customer didn't state, but that are implied by intended use and statutory and regulatory requirements. The customer's requirements, including requirements for contingency actions, shall be confirmed by the organisation before acceptance, when the customer does not provide a documented statement of their requirements.

If the customer changes its requests after signing a contract, the Sales Consultant treats changed requests as new requests and raises a variation for approval.

3.4. Customer's requests review

3.4.1. Customer's request review for a standard house

The Sales Consultant consults the Operations Manager/Construction Manager regarding whether the house can be built within the demanded deadline and according to requirements, and then notifies the customer about accepting the request, taking into account requirements for the build generally.

The Sales Consultant confirms the customer's request by signing the document received by the customer in which the requests are stated.

3.4.2. Customer's request review for non-standard house

Non-standard house construction (product/service) is any house which differs from the regular assortment of the offerings by Crystele Homes.

The Sales Team / Sales Consultant determine necessary actions to meet the customer's request, after meeting with the Operations Manager and Building designer.

If the customer's request cannot be met, the Sales Consultant informs the customer about inability to meet the request.

If Crystele Homes is able to meet the customer's request, the Sales Consultant informs the customer and provides the contract

The Sales Consultant communicates with customers related to accepting the offer. The Sales Consultant records every new requirement for the house in the Client Folder.

3.5. Stipulating the contract/tender

After reviewing the customer's requests and accepting the budget, the Sales Consultant creates the tender for constructing the house. The contract must contain all customer requests, activities after delivering product and way of solving customer's complaints.

If the contract or customer's order contains requests that differ from those previously stated, and, if the request can be met, contacts the customer in order to adjust the contract/tender and appropriate documents to the customer's requests. If the contract/tender or customer's order contains requests that differ from those previously stated, the Sales Consultant undertakes actions described in section 3.3 and, if the request can be met, contacts the customer in order to adjust the contract and appropriate documents to the customer's requests.

After adjusting to changes, the Sales Consultant prepares a new contract/tender.

3.6. Creating Contract Documents

The Sales Consultant creates appropriate tender/variation documents based on reviewed customer requests and delivers them to the Operations Manager and possibly the Building Designer.

3.7. Product Handover

According to the Tender documents, the Site Foreman or Construction Manager organises the handover of the house and a walkthrough. The walkthrough would list any items unacceptable to the customer – and which the Site Supervisor then organises to be rectified.. The customer is then told they have 90 days to produce an additional list of items to be fixed.

3.8. Customer & interested parties complaints

The Accounts Assistant records all complaints of customers and interested parties in the Registry of Customer & Interested Parties Complaints, which is later used as an input for management review and measurement of customer satisfaction. Complaints can be about product quality, construction/build time, environment and communication with employees of the organisation.

After receiving complaints, the Construction Manager assesses whether the complaint is reasonable and then suggests ways of resolving the complaint to the Director, who approves it and decides whether the correction or corrective action according to Procedure for Control of Non-Conforming Product is needed.

3.9. Environmental operational controls related to customers

The Construction Manager and Site Supervisors are responsible to manage the work and to ensure Environmental Protection laws are followed while construction is in progress on Build sites.

The Sales Consultant will include in the offer to the customer for the possibility of using Environmentally Friendly materials and products. This may also include changing models of materials and equipment to be make the house more environmentally sustainable.

The Sales Consultant would generally discuss items like;

- Air Conditioning Sizes
- Water Tanks
- Kitchen Products – Gas Electricity
- Glazing, Heating/Cooling alternatives

- Materials (Timber/Plastic wood)
- Door Type, recycled products

3.10. OH&S operational controls related to customers and visitors

The Construction Manager and Site Supervisors will. Manage the construction/build site including the safety and operational controls at the site. Including sub-contractor management.

The Sales Consultant will also remind the customer that during the build they are unable to freely go to the site due to safety issues, and are required to discuss a walkthrough (escorted) with the Site Supervisor by appointment only.

4. Managing records kept on the basis of this document

Record name	Code	Storage			Responsibility
		Retention time	Location	Protection	
Registry of Customer and Interested Parties Complaints	18.1 (Tab 2)	2 years	SharePoint	Backup	Operations Manager

Only the Director or Operations Manager can grant other employees access to the records.

5. Appendices

- Activity Register Tab 2 – Registry of Customer and Interested Parties Complaints

6. Change history

Date	Version	Created by	Description of change
19/11/2021	0.1	S.Pauley	Document Creation
4/5/2022	1.0	S.Pauley	Document Approved