



# Home Address

Building Better Service

## Orientation Fine Points

*Part 2: Terminology, Paperwork, & Emotional Anchors*

Improvements are possible with any process and polishing orientation practices is no exception. Investing time and effort in orchestrating this meeting in particular results in greater customer loyalty and repays you many times over. At a time when home buyers' emotions and nerves are magnified, getting the details right has an enormous impact on homeowners' attitudes toward warranty and referrals. The former can save money, the latter can generate income. Take advantage of both opportunities by making home buyers ecstatic at move in.

*Terminology: What's in a Name?*

How do company personnel talk about the orientation? If you hear a variety of names such as walk through (walk thru, or simply "the walk"), preoccupancy inspection ("pre-occ"), turnover meeting, or any number of other terms, take steps to align vocabulary. While you're at it, check on the name that appears on supporting paperwork and how this meeting is referred to in your homeowner guide and on your Website.

The many different names companies use come from the variety of personnel who joined your company with experience from other organizations. They are likely to bring the vocabulary of their former job along. Employees understand each other when they hear these names, but unless you take steps to standardize this detail—including all related documentation—home buyers can get confused by the jargon.

Just as significant, the company misses an opportunity to emphasize education over inspection. No one suggests attempting to orient buyers to their new home without also noting details that need last minute attention—it is likely that inspection will always be a part of this meeting. However, confirming the good condition of the home and that the level of quality mirrors that of model homes should be incidental to the educational aspects of this meeting, not the main purpose of it.

Make the concept of "one name, same name" a standard part of all of your planned customer meetings. Decide on a name for each routine customer meeting and use that name consistently in all documents and conversations. (To see the impact of consistency in meeting paperwork, download [Sample Meeting Agendas](#)).

The name for the homeowner orientation will work best when it reinforces the purposes of the meeting: education about use and care of the home, celebration of the delivery, and lastly, confirmation of condition and quality. Homeowner Orientation or New Home Demonstration are possibilities. You might even venture into more emotional territory with Welcome Home Celebration or something similar.

*Paperwork*

An emergency phone list with names and contact information for mechanical trades is commonly provided with the materials delivered at orientation. This is easily taken a step further by providing a refrigerator magnet or a sticker with the same details. Whether the homeowner puts

the magnet on the refrigerator or installs the sticker near the kitchen phone, the numbers are more likely to be readily located if they are needed.

For most builders, manufacturer literature (warranty registrations cards, use and care manuals and so on) tend to accumulate in one or more kitchen drawers—still in their envelopes, plastic bags, or just a loose pile of papers. In some cases, the furnace and water heater literature are taped to the side of the equipment. The end result is a disorganized collection of often wrinkled, dusty, torn, or missing items.

It takes just a few minutes to place these into plastic page protectors and install all of them in a 3-ring binder. To polish this effort a bit more, print labels (return address size works well) naming the items: Furnace, Water Heater, Humidifier, and so on. As the binder is assembled, you can take note of any missing items and get busy tracking down another copy. Most importantly, ensure that all warranty registration cards are present.

Fresno based Granville Homes delivered color print-outs showing the trees and shrubs installed in yards with basic points about care: watering, fertilizer; pruning and so on. These were specific to the home and a wonderful addition to the orientation paperwork. Ensure that the formatting of this information matches that of your homeowner guide. Have the material printed on 3-hole paper so home buyers can insert the new pages into their homeowner guide for convenient reference. Signs of thoughtfulness like this cost little and make a big impression.

#### *Emotional Anchors*

Speaking of impressions, build some emotional opportunities into your procedures—positive ones, that is. For example, Edmonton, Alberta, custom home builder Classic Homes added a wonderful touch to the confirmation tour a few days after the orientation. Sales, construction, and warranty personnel all attend this short meeting.

After taking the new homeowners through their new home to confirm items had been completed, the superintendent explains how the new keys will change the tumblers in the exterior door locks, making the construction key inoperable. The new homeowners their house keys, they were then invited to insert the new house key and make the home their own. This is a memorable moment for most buyers, bringing tears to the eyes of some of them.

Another company delivers a photo album with dozens of pictures of the home through various stages of construction. Yet another provides a framed rendering of the front elevation. Such seemingly small gestures make an impact on the customers' feelings—and emotional memories last a long time.

In what way is your orientation process a celebration? This is an opportunity to build significant customer loyalty—just a bit of thought and creativity are all that's needed. All this attention to detail is well-rewarded.

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## Talking Points: Meeting Reminders

Whether one person or several in your company schedule customer meetings, you have a painless opportunity to work on aligning buyer expectations by developing a “Talking Points” sheet to use in setting up appointments.

By Identifying details that will help home buyers prepare for meetings and arrive knowing what to expect. This method—which takes only moments once it's in place—can stimulate buyers' use of

your homeowner guide. Just as valuable, it can eliminate a common situation: Customers often arrive for a meeting and their first comment is “I really don’t know what this meeting is for” or something similar.

The complexity of the new home process creates a responsibility for builders to keep customers informed and connected. None of us enjoy feeling uninformed. In this case, it’s unnecessary. A few simple reminders call attention to important details and smoothes the way for a comfortable experience.

You can download our sample [Talking Points](#) and customize the details for your particular meetings. Conduct some brief role plays to ensure the details to be covered flow naturally and you are ready to put this idea to work. If more than one individual is involved in the scheduling of meetings, each staff member can highlight the column related to the meeting they set up. Update the Talking Points when you do your annual homeowner guide revisions.