

Lockwood Sales, Design and Construction



Road map to success
March 2024 | Version 1



LOCKWOOD
Designed for good

Overview

This guide aims to provide assistance to Contractors and Lockwood staff throughout the process of selling, designing and constructing a Lockwood home, working through each step to realise the client's dream home.

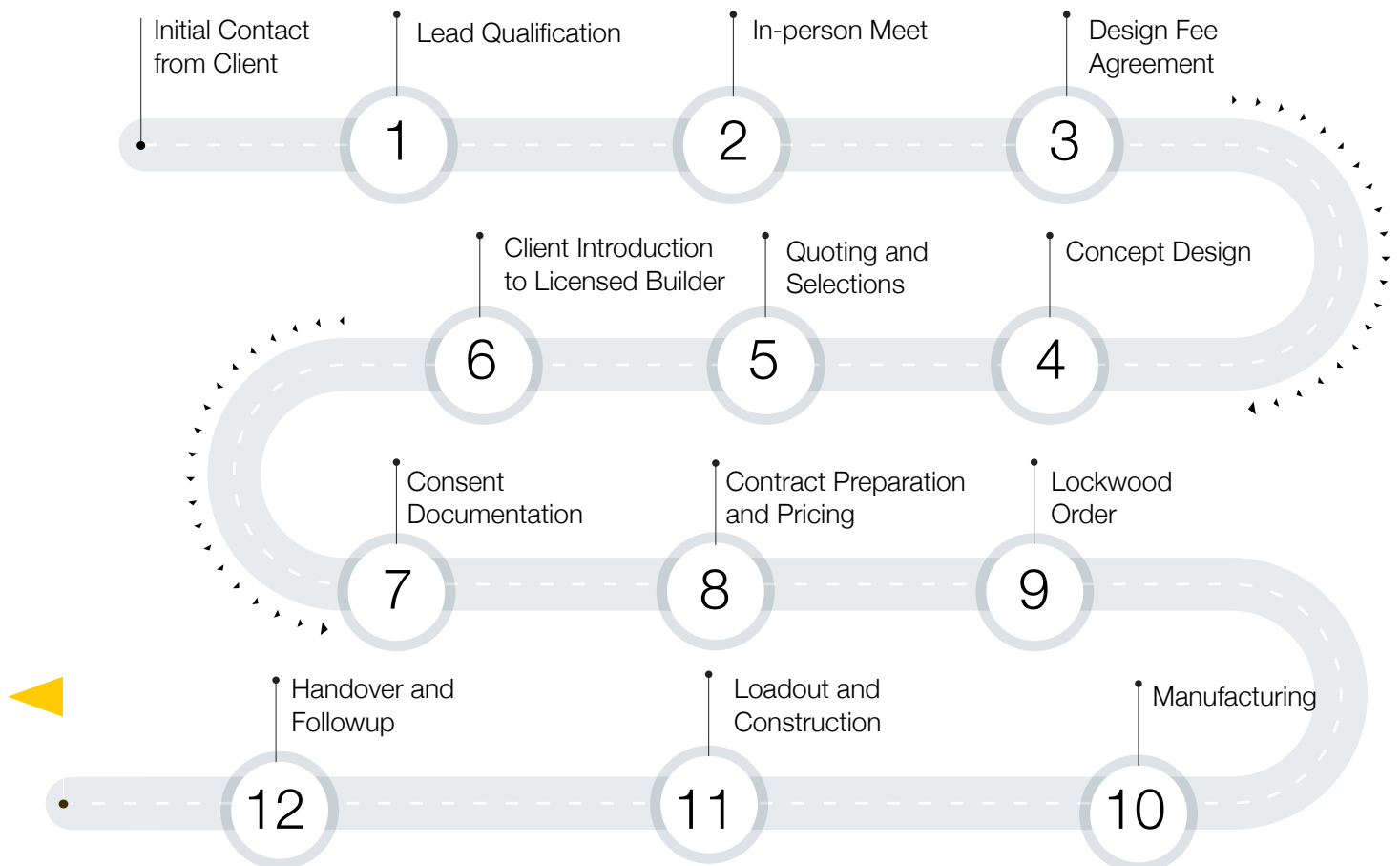
This road map provides clear guidance on the next steps, where to find key information, who to contact for assistance, and the relevant documentation needed at each stage.

While this document is less relevant to experienced and exclusive contractors who are accustomed to managing clients through a design and build project, you may find this helpful for training new staff or understanding where to find useful documentation.

Designing and building a home is a complex process and there are always challenges to navigate along the way. But one thing always has to come first - making sure the customer's needs are met. That means being there for them every step of the way, being their advocate, and keeping them in the loop with clear and consistent communication.

Building a home isn't just about constructing a physical structure but also about constructing a positive and memorable journey. Every step of the way, from the initial consultation to the final walk through, the priority is to ensure the customer feels supported, informed, and confident in their decision to choose Lockwood.

Road map



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Useful Documents

The useful documents shared in this book are all available to registered members at www.lockwood.co.nz/resources unless otherwise stated.

1 Lead Qualification



Potential customers contact us in a number of ways. When they first get in touch they are entered into our Customer Relationship Management software (CRM) as a 'Lead'.

The Front Line team will then work on qualifying them. Most often this is with a phone call and follow up email with further information.

Once qualified, the Lead will be converted to an Opportunity and passed onto Sales. This could be a Lockwood internal salesperson or directly to the Contractor if they are confident, and in the position to in handle the design and sales process.



If a customer gets in direct contact with you, send the contact details to **info@lockwood.co.nz** and the Front Line team will enter them into CRM.



When is a Lead considered Qualified?

- They have already purchased land.
- They have a realistic budget for what they intend to build.
- They understand and want Lockwood.

2 In-person Meet



Meeting the client to discuss their design, define their needs, and get an understanding of the possibilities on their building site is the next step in the sales process.

Often, the clients have previously met the salesperson at a show home or office for a general discussion. Following this up with a visit to their site is recommended as it shows commitment and enthusiasm for their project and gives valuable insights on the scope and limitations of the project.



Ideally, the site meeting would be attended by both the salesperson and the building contractor, facilitating the client's introduction to the contracted builder.

In the case of a full design and build project, the designer or architect should ideally be present, ensuring they gather the necessary information for a thorough design brief.



Useful Documents

- Welcome to Lockwood book
- Lockwood Designed for Good plan book
- Example of a Design Fee Agreement

Download from Resources or request hard-copies from Marketing

3 Design Fee Agreement

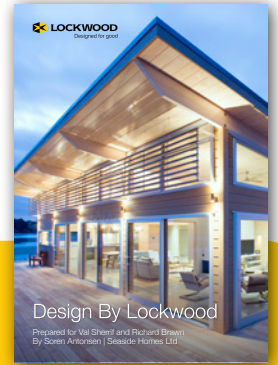


Sales success starts with design. As a general rule, avoid undertaking design work unless an agreement has been executed and a design fee is paid.

The design fee agreement requests payment from the client for the initial site investigation and preparation of concept plans. Typically, this agreement is compiled and presented by the salesperson after obtaining quotes for the work from an architectural designer.

The fees for these services are significant and reflect a commitment from the client. The agreement needs to be clear in defining the scope of work, transparent in detailing fees, and professionally presented.

Once they have signed and paid the fee, the client will need a current certificate of title, site survey and geotechnical report. In some cases the client may have arranged these themselves, or the salesperson will offer to engage these external contractors, retaining a margin to cover the work involved.



Lockwood Design Fee Agreements

These professionally presented, bound documents leave a positive impression, providing a clear outline of the design process for the client.

Lockwood marketing will create a customised template for your business, taking care of the creation, printing, binding, and personalised delivery of design fee agreements upon request.

4 Concept Design



Clients have the option to use Lockwood's in-house design team or an external architect/architectural designer to create concept drawings in line with the client's brief. The time required for completing the concept design varies based on the design complexity and client-requested revisions, ranging from a few weeks to several months. Salespeople are responsible for effectively handling client requests for changes, ensuring that revisions align with the scope outlined in the Design Fee Agreement.

Concept plans are required for a pricing estimate and Lockwood component quote.

The Lockwood design team offers a consultation service for Designers.

Before designs are costed and consent drawings started, the team will look at beam sizing, post placement, general details, and buildability. They may also provide suggestions to make the design more cost-effective.

Contact technical@lockwood.co.nz to book this service.



Useful Documents

- Designers Handbook
- Condensed Structural Handbook
- Joinery Systems Brochure
- Bracing Calculation Sheet

5 Estimate and Lockwood Quote



Once the client has approved the concept plans, a component quote can be requested from Lockwood Costings. A Quote form will need to be sent with the plans to the costings team.

Once the component price is known, this will form part of a full build estimate for the client.

If Lockwood internal sales are still managing the sales process at this point, they will engage with the Building Contractor for estimated pricing and PC sums for the construction and non-Lockwood materials for the home. They will also work through some selections for the fit-out of the home, especially items that need to be specified in consent documentation, such as heating.



Timeliness

Customers who choose not to proceed with a build often give reasons such as finding the process too difficult, experiencing delays in receiving pricing information, or having insufficient detail and transparency regarding costs.



- Quote Form
- Lockwood Pricebook

6 Introduction to Contracted Builder



Ideally, and in most cases, the client will have been introduced to the Contractor before this point.

If this hasn't happened, an introduction is essential now. The Client will primarily be dealing with the contractor from this point forward.

7 Consent Documentation



An LBP designer will be required to prepare consent documentation. The Salesperson or Contractor will need to get a quote for this work and for any engineering that may be required.

Work can start on the consent documentation once the client has given written approval to proceed and paid the required fee.

The contractor needs to work alongside the LBP designer during the consent process to be familiar with the specified items and impact of these to the build price.



- Lockwood Bracing Sheets
- Lockwood Detail Manual (or request specific details from technical@lockwood.co.nz)
- CodeMark designers declaration

8 Contract Preparation and Pricing



Every build will require a Residential Building Contract. The Contractor will always prepare this for the client.

Client fit out selections and pricing can start while the consent documentation is being prepared. It is best that the client works with local suppliers for their kitchen, bathroom and floor coverings. Usually, there will be experienced experts on hand to help them make selections, and they can supply the client with pricing including a markup for the contractor.

When the consent documents are received and ready to be lodged these can be sent to local sub trades for quotes and sent to Lockwood costings for an updated component pricing.

The contract should contain the consent plans and the specifications that have been priced into the cost. Make sure to clearly outline any PC sums and exclusions.

Contractors need to be aware of what will be supplied by Lockwood and what they will need to source from elsewhere. Contractors will also need to price in Site Glazing. Contract templates and examples are available if you need assistance.

Contact Sarah: sarahsmith@lockwood.co.nz



- **A Residential Building Contract is required for any work over \$30,000.**
- Ensure all prescribed information is included in the contract - further information at www.building.govt.nz
- PC Sums or Provision Sums need to be clearly outlined.
- Ensure exclusions in the contract price are clear.



- Site Glazing Procedure
- Lockwood Product Catalogue
- Joinery Systems Brochure

9 Lockwood Order



Once the contract is signed and Consent has been lodged, the contractor can place the Lockwood order. Send the documents to **accounts@lockwood.co.nz**.

The Contractor will receive confirmation of the order along with a timeline for the various stages of manufacturing and progress payment due dates. This confirmation is designed to be sent onto the client so they can plan for progress payments.



- Lockwood Order Form
- Designers Declaration
- Lockwood Specification



A full Lockwood order needs to contain:

- Completed Lockwood Order form, including Joinery and Customer Information forms.
- Copy of the Building Contract including signed consent plans.
- Master Builders Guarantee.
- Building Consent (approved/applied for) .
- Lockwood Specification (signed).
- Final Consent plans (Electronic Copy).
- Engineering / bracing calcs with producer statement for modified standard or special designs.
- Designers Declaration.

For help with ordering contact technical@lockwood.co.nz.

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Manufacturing



The Manufacturing process takes around 9-12 weeks depending on the complexity of design and pipeline of orders. Lead times are regularly updated and communicated in Pinevine (the Lockwood internal newsletter.)

The process begins with the Production drawings which detail each board, beam, power and tie rod hole.

Joinery bar is ordered early in the process as there is a lead time of around six weeks.

Finalised production drawings are passed onto the Manufacturing team who then get to work crafting each component of the home.



When the order is placed, the Frontline team sends a “Welcome to the Family” Gift and invite clients on a factory tour. Ideally, clients witness their components being made or packaged with their name and unique Lockwood number. Frontline will inform the contractor If clients coordinate tour times directly with Lockwood. Contractors are invited to attend the tour if they choose to do so.

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Load Out and Construction



The Logistics Manager will call the Contractor to confirm or reschedule Loadout date one week from intended load-out. Payment must be received in full before the date is confirmed. All house component deliveries are scheduled to be delivered on site at 8.00am but the truck driver will have a contact phone number if anything changes.

If there is limited room on site and components are arriving on a truck and trailer Hiab then a suitable transfer location close to the site needs to be arranged. For South Island deliveries to site, the Contractor will need to arrange either a Hiab or Crane to unload the truck.

When building, always have the current Lockwood Detail Manual handy and ensure all details are up to date. If in doubt with any point regarding the assembly of Lockwood components or technical information, contact the technical team on 07 347 7691.

It is absolutely critical the components are protected from moisture to minimise board growth during construction. This includes when they are stored, or when being assembled. We recommend having the building wrapped, especially for complex builds. If this is not an option, walls need to be protected by plastic at the end of each day, or if wet weather is imminent.



- Assembly Manual
- Detail Manual
- Onsite Checklist / Builders Declaration



Issues with the Lockwood components on delivery or during construction need to be reported via a Field Report.

This QR code is printed on your Lockwood plans. Scan for a quick and easy link to the form.



First Build Assistance

- To help unload, stack, and sort components, Lockwood will provide someone to assist with delivery and help set up for a smooth build.
- Assistance will also be provided to set out first boards and get construction underway.
- If further help is required during construction (whether or not is your first Lockwood build) please ask.

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Handover and Followup



On completion of the build, fill out and submit the Builders Declaration. This can be done via the QR code on the plans, or on paper and scanned to info@lockwood.co.nz. The completed builders declaration will also be required by the local BCA to issue the final Code Compliance Certificate.

The front line team will confirm receipt of the declaration and send out a New Home Gift to the client, which will include a survey on their experience. We will share the feedback from the client if they are happy for us to do so.



Marketing invest heavily in photography of new homes and renovations to use in promotions and advertising.

If you believe the completed home will make for great photography, and the client is open to allowing us to do so, send some images of the completed build to the marketing team for consideration.



- Onsite Checklist / Builders Declaration or scan the QR code to complete online.





The longevity and strength of our brand reputation is closely tied to the satisfaction of our customers. The focus for all staff and contractors needs to extend to the overall customer experience through every step in the process.

In an industry where challenges can arise unexpectedly, the importance of responsive customer service cannot be overstated. It's about more than just building homes; it's about building relationships and fostering a positive connection with each customer.

We encourage you to reach out for assistance at any point to ensure a positive journey for our customers. Together, let's create homes that not only stand the test of time but also leave a lasting impression of quality and customer care.



For more information email:
info@lockwood.co.nz
or phone +647 347 7691



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