

# FHL Sales Process

## for Footprint and Lifestyle Range



### Abbreviations Key

FHL = Footprint Homes NZ Ltd	BOS = Build on site
CP = Construction Partner	GEO = Geotech Report
SST = FHL Sales Support Team (Joanie/Selena/Deb)	TP58 = Septic Drainage Site Assessment/design
HS = HubSpot	LIM = Land Information Memoranda
RRP Pricelist = Recommended Retail Pricelist	PIM = Project Information Memoranda
QS = Quantity Surveyor	NZBC = NZ Building Code
SAFR = Site Assessment & Feasibility Report	CCC = Code Compliance Certificate
STG 1 Working Drawings – OFF SITE (Yard Working Drawings from bearers up – no site information)	NZBS = NZ Building Standards
STG 2 Working Drawings - ON SITE (inc site plans, services and foundation plans)	RBW = Restricted Building Work
JBA = Johnson Brierley Architects for STG 1 & 2 WD	COA = Certificate of Acceptance
SA = Steve Archer Architects for all SAFR (Site Assessment & Feasibility Report)	GIS = Online maps that display publicly
WHITEBAIT = Whitebait Architectural Services (ITM)	CAR = Contractors All Risk Insurance
SFA = Short Form Agreement professional services	PS1 = Producer Statement for Certified Design
BC = Building Consent	PS2 = Design Review Producer Statement
RC = Resource Consent	PS3 = Construction Signoff Producer Statement
RFI = Council request for further information	PS4 = Construction Review Producer Statement
OFF SITE BC = Yard Building Consent	ROW = Right of Way
ON SITE BC = On Site Building Consent (Clients Site)	

## STAGES

### 1 – Client Enquiry received

#### Website, Online and Direct Enquiries

All Enquiries received via the website and online marketing (Trade Me, Facebook etc.) will be automatically loaded into Hubspot.com by **FHL Sales Support Team (SST)**.

Upon **SST** receiving the enquiry they make initial contact with client to obtain any further client details, confirm site information, plan and budget, determine zoning from our maps, council and any other important information so we are only passing on quality leads for you to follow up. Refer to timeframes on the last page of this document.

All new enquiries received directly by the **Sales Partner (SP)** are to be sent to Joanie [joanie@footprinthomes.co.nz](mailto:joanie@footprinthomes.co.nz) where they will be recorded on Hubspot.com, ensure to include correct spelling of clients names, all site details, attachments and any other relevant information.

Once the **SP** receives notification of the enquiry from **SST**, the **SP** has a maximum of 24hrs to respond either by phone or email to make 'your' initial contact unless otherwise told by **SST**.

A sales report will be emailed every Tuesday and Friday AM to the **SP's**. Please ensure you go over the enquiries section and email Joanie with any updates not already provided.

After your consultation/s with the client/s and price indications from the website or RRP Price list are provided, along with discussions of upgrades available and clients are now ready to firm up the price and receive an **FHL Flatpack Supply Estimate** and/or **Construction Partner Estimate**, refer to

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- **Client ready for FHL Estimate, Concepts, Kitchen Layout, Construction Partner Estimate** to make your request.

If **FHL** make the initial contact with the client and they don't provide all required information to provide a Flatpack Estimate and are still unsure of which plan they are interested in and/or want to discuss in further detail, **SST** will hold onto this enquiry and continue to make regular contact until the lead becomes HOT and will then allocate the enquiry to the **SP** to follow up on and clarify their requirements.

**Is Consent Required? If the tiny home or cabin has a kitchen or bathroom, then yes, a Building Consent is required.**

However, if a client requests a non-consented building of any size that requires water connections, below are the client's options.

FHL can supply the clients with Flatpack Materials delivered to the client's site for the client to arrange their own builder OR FHL supplies the clients Flatpack Materials for the CP to build in their yard. Our CP's have the agreement to build on the yard with the landowner, so it is at the CP's discretion if they are happy to build a non-consented building. Note: Clients cannot obtain a CCC if there is no BC.

<b>Do you offer finance?</b>	We can introduce you to companies offering finance once we better understand your needs. If you need finance, you will certainly need a BC, otherwise the bank won't release the progress payments
<b>Do you have a Show-home?</b>	Yes, a <b>FHL</b> Show-home is available for viewing in the Bay of Plenty and Whangarei Yes, a Habitat Show home will be available for viewing in Warkworth. Construction commenced mid July 2024 Yes, we have builds under construction that can be viewed by appointment in the Bay of Plenty Video walk-throughs can be sent, or Photo/Render Gallery for each plan is available.

**NOTE:** If Footprint Homes is involved in the construction of your project and the design includes a bathroom and/or toilet, a building consent and Code Compliance Certificate (CCC) will be required. As we offer both yard-based builds and on-site construction, the associated costs for consent and compliance cannot be determined until specific project requirements have been confirmed. Please be advised that consenting fees will apply accordingly.

## **2 – Site Assessment & Feasibility Report**

**FHL** offers a Site Assessment and Feasibility Report (**SAFR**) service to determine site restrictions, site requirements and potential issues ie; Resource consent, site restrictions, liquefaction ground and site service connections.

The report will be inclusive of the following and includes the Site and location plan.

- Request and obtain council site files for site
- Review certificate of title and any consent notices
- Check the council planning rules to determine the following
  - Is resource consent required?
  - Site stability and suitability
  - Site boundary requirements
  - Site covenants
- Determine site services and requirements for proposed build project
- Confirm whether a site survey plan or site levels/heights are required
- Determine any requirements for an on-site wastewater system (where applicable)
- Provide aerial view of site showing chosen plan located on site and identify boundaries and any potential

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- impingements for consideration, along with a render of building on site
- Review of Geotechnical report when provided
- If no Geotechnical report is provided, provide contact information for an engineer and pricing
- Confirm any considerations for council development contributions
- Next steps and items to consider

To engage **FHL** for this service, request the client to complete or assist client with completing the **Site Assessment and Feasibility Report** online [www.footprinthomes.co.nz/sales-portal](http://www.footprinthomes.co.nz/sales-portal) form by selecting what they require and submit the form to the **SST**. **SST** will create and invoice and send onto the client for payment, once payment is received **SST** will advise Steve Archer where he will then make contact with the client to get this report underway.

The **SP** needs to obtain any site information the client may already have on hand and send to **FHL SST**

What **SST** will send to Architect for Site Assessment and Feasibility Costs

- Confirmed **FHL** Concept plan selected and any modifications, decks, landings
- Full Site Address
- BRANZ site map
- Any other information that the client may have provided

**Remember that this stage is critical to the overall outcome of the project and if undertaken the cost will be credited back to the client in their Flatpack Material Estimate**

### EXCLUSIONS

- Site plan siting location is based on Footprint Homes plan range only, customs designs will incur additional designer fee to prepare floor plan @ \$195.00 p/h – this may be required where there are boundary restrictions to determine custom design will fit within the council planning rules
- Client to organise the necessary information and reports, not included in council information pack
- Geotechnical report, topographical/levels, septic and stormwater design
- Any consultant fees for surveyors and/or engineer
- Any council building consent or resource consent fees and charges
- Dealing with NES FW or contaminated ground

### **3 – Client ready for FHL Estimate, Concepts, Kitchen Layout, Construction Partner Estimate**

An **Estimate** is provided upon initial request and based on client selections from the material upgrade & colour schedule. The client pays their deposit based at which point enables **FHL** to lock in their pricing for a 3-month period while either **OFF SITE/ON SITE STG 1 and/or 2 Working Drawings** are underway. At this point the client will also need to complete the **SFA** to Johnson Brierly Architecture for **Working Drawings STG 2** and Building Consent application/management.

**SST** will forward the online link to the material, upgrade & colour Schedule to the client and schedule an appointment with the client to confirm all products, materials and upgrades. Once the above is confirmed **SST** will send an email to **QS/Zach** advising that the client is ready for an Estimate and provide all information required.

Gathering this information at this point will enable **FHL** to prepare the estimate based on all requirements from the initial estimate request and reduce the need for many revisions down the track. All upgrades selected from the online form will be PDF'd and sent back to the client for their approval before being able to finalise the estimate.

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Please ensure you have provided, and triple confirmed all client details prior to requesting the Estimate, correctly spelt name/s MOST IMPORTANT, site address, phone number, email address, YARD consent, ONSITE consent or both.

**FOUNDATIONS** - We have 2 options available for foundations

- 1) **Traditional timber pile foundations** – there are suggested where site is deemed good ground by way of Geotech report, reasonably flat ground and little excavation is required.
- 2) **Wildboar Foundations** – is suggested for use where Geotech reports shows any site instability issues, sloping ground, liquefaction etc

**Wildboar Foundation System** – where it looks like this system is going to be required we can provide client an indication of costs through Wildboar, if the client doesn't yet have the required Geotech information to confirm the actual supply/install price, we can provide a calculation using our Wildboar schedule of rates, however this only assumes 'Good Ground and Flat Site – NZ3604' and max Finished Floor Level height of 600mm. If the client has a Geotech report less than 2 years old Wildboar can provide a more accurate quote, final quotation of this system is completed once client has paid deposit to engage the Wildboar engineer where they determine any/all structural requirements for the site.

Generally, the Wildboar Supply/Install is **NOT** included in our Flatpack Material Supply (for finance reasons we can make exceptions), but our preference is having client engage Wildboar directly through **FHL** by way of **SFA** as we do not clip the ticket on this which enables **FHL** to keep costs down.

**Installation** - In some situations, the **CP** may be able to provide installation of this system as part of their agreement, please check with **FHL**.

**SST** provides the following documents to **Wildboar** for quote request

- Client completed **SFA** any site information obtained from the **SAFR**, Geotech where provided
- Concept plans for the nearest standard plan which includes the foundation plan
- Approx finished floor level (FFL), generally 620mm is the lowest for a flat site

If a client decides to engage **Wildboar**, **Wildboar** will issue an invoice to the client to begin undertaking works required. An existing Geotech report is acceptable providing it's no older 2 years. If the client does not yet have a Geotech report and this hasn't been organised this will need to be arranged urgently, a Geotech is required to finalise Working Drawings and design of the above services. A typical Geotech report takes 3 to 6 weeks to receive so the earlier the better that this is applied for. The following Information is required to accompany all requests. **Wildboar** will commence work once payment has been received

**NOTE:** A current or new Site Specific Geotech Report is required for **ALL** foundations and drainage design (if no sewer connection)

If a client has selected to include Wildboar Foundations, Natural Flow Wastewater Systems, Solar, or any other Supplier/Contractors we will request an Offer of Service Agreement from each Supplier/Contractor to provide cost indications direct to the client. We don't include these as a part of our standard material supply, we do this because we want to promote the supply of these products whilst keeping costs affordable and reducing the need for additional management and coordination of these systems.

Both Wildboar and Natural Flow Wastewater Systems have engineers who can be engaged to provide all services and documentation required for Full Working Drawings and Building Consent/s, so its preferable to use their contacts, or the client can engage their own.

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Where the home is built on a yard and transported to site **SST** requests a delivery quotation via **Grasshopper Limited** in Matamata. The following Information is required to accompany all requests.

- Client name
- Site/drop off address
- Pick up address
- Contact person and phone number at pick up address
- Client phone number
- SQM of home
- Width of home
- Height at highest point
- Length
- Approx weight
- Completed \$ value of home
- Approx finished floor level (FFL), generally 620mm is the lowest for a flat site
- Site/Access photos
- Plan of home showing foundation placement
- Approx time of move (month)
- Any issues we know about i.e. low power lines. Tight access, lift over existing buildings etc
- Width of driveway

**FHL** will indicate in the Estimate the proposed **CP** construction allowance based on the agreed **CP** Schedule of rates. All Estimates are subject to any revisions required upon the Working Drawings being completed and approved, noting any amendments required during the BC/RFI process that may require a change or additional materials and labour.

Refer to indicative timeframes on pg 9 for Estimate turnaround time.

Upon completion and checking of the Estimate, **FHL** will forward the Estimate to the **SP** for checking prior to presentation to the client within 24 hours either by email or personal face to face personal presentation. In either situation the **SP** must go through the Estimate line by line so both parties understand exactly what is/isn't included, noting any queries as they go. Where based on a standard plan the Estimate will include Standard Plan Concepts (Floor Plan, Elevations, Cross Section, Electrical Plan) along with the Kaboodle standard plan design for client acceptance by electronic signature. If a client requests amendments to the standard plan, where **FHL** cannot provide a sketch there may be a designer fee involved at this point of \$190 p/h inc GST to provide concepts. Refer to timelines for a non-standard plan Estimate request.

The Estimate will be inclusive of

- FHL Material Supply Estimate
- FHL Terms and Conditions and Payment Schedule
- Construction Partner build cost indication
- Step-by-Step Process (for your client)
- Concepts (Floor Plan, Elevations, Cross Section, Electrical Plan)
- Kaboodle Kitchen layout based on Signature Range Everyday Specifications
- Signed copy of the Products, Materials and Colour form

Documents in **Bold** will require signing off via DocuSign for client acceptance, if not completed prior.

Once the client is happy and ready to accept the Estimate, advise **SST** who will provide all documents via DocuSign, a link will be sent to the client directly and cc to you, they can be electronically signed and submitted back to **FHL**.

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### 4 – Client ready to proceed

After **FHL** has provided above documents via DocuSign and client has electronically signed and **FHL** countersigned, the client can make the deposit payment as indicated in the estimate, upon **FHL** receiving the deposit, a signed copy of all documents will be sent back to the **SP** to forward onto the client for their records long with receipt of deposit payment.

**FHL** will then request **JBA** to begin either of the below Working Drawing options dependent on construction requirements, ie; build on **OFF SITE** (yard) and **ON SITE** (client's site) **FWD** and Consents - or - build **ON SITE FWD** and Consent only (clients site)

You can now claim your 1<sup>st</sup> Commission Payment upon above signed documents being completed and deposit received and receipted

### WORKING DRAWINGS STG 1 & 2 for OFF-SITE and ON-SITE BC

#### Working Drawings for OFF SITE BC plus ON-SITE BC stages

**OFF SITE FWD** are included in the FHL Material Supply Agreement utilising the Master Set of Working Drawings for the standard plan. **OFF SITE FWD** and consent documents include **CCC**, **CCC** inspection will be arranged prior to being transported to site and copy of council field notice confirming the **CCC** inspection has been approved will be provided. **CCC** will follow in due course upon council processing and be sent to the client.

Any modifications to the standard plan concepts incur an Architect fee of \$190 p/h inc GST to make these amendments. These fees are payable to the Architect prior to the Working Drawings being released, this is a charge up fee based on time taken to make amendments.

During the **OFF SITE FWD** process the Architect will send a Local Authority Agency Form to the client to sign (this allows them to access council files related to the property). On completion of **OFF SITE FWD**, the Building consent will then be lodged with the Local Authority by Johnson Brierley Architecture who will manage the consent process.

The council will invoice the client directly for the Application fee. Once **OFF SITE FWD** and consent is lodged, the Architect will finalise **ON SITE** Working Drawings and consent application for **ON SITE BC** application. The client must have obtained and provided all relevant engineering documents as required by the Site Assessment and Feasibility Report.

- Geotech
- Topographical
- Site Services and Connections

The client is responsible for payment of all **ON SITE FWD** and Building Consent Application costs directly the local authority, refer to the Architect **SFA** for management of **RFIs** and **ON-SITE FWD** and consent fees.

#### Working Drawings for ON-SITE CONSENT only

There is a designer fee to provide the **ON-SITE** working drawings inclusive of foundation design, site connections and services, wastewater, stormwater etc, this additional cost will have been outlined the SFA provided by the designer Client must have obtained and provided all relevant engineering documents as required by the **FHL SAFR**

- Geotech



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- Topographical
- Site Services and Connections

The client is responsible for all **ON SITE WD** and Consent Application costs direct to the Architect and local authority, refer to the **SFA** for management of **RFIs** and **ON-SITE WD** and consent fees. The Architect will complete **WD** and **ONSITE** Consent Application and lodge with Local Authority.

**WD** will be produced utilising the Master Set of the standard plan WD. Any modifications to the standard plan working drawings incur an Architect fee of \$190 p/h inc GST to amend. These fees are payable to the Architect prior to the Working Drawings being released, this is a charge up fee based on time taken to make amendments.

During the Working Drawings and Consent stages all communications are to be directed and followed up by **SST**, for any queries please ensure you contact **SST** in the first instance not directly to the Architect.

Once consent/s have been granted **FHL** will then complete and finalise Rave material supply take off and Construction Partner calculations and make any required adjustments based on the consented Working Drawings, we will provide you with a **FHL** Material Supply **Quotation** to present to your client. Again, make a time to go through this with your client making sure they understand all Terms and Conditions and payment schedule, **FHL** will outline any amendments within the Quotation from the initial Estimate with explanations as to what has been required and why.

**NOTE:** Often working drawing changes arise during the consent process that is beyond both **FHL** and Architects control which mean we need to adjust within our material supply, this may affect the earlier estimated price provided. These changes may also reflect in the Construction Partner Quotation too where additional labour may also be required.

The Architect will notify **SST** when the Building Consent has been approved, we will then notify you to advise your client to contact their Local Authority and if not already done, arrange payment for all Consent fees which will then allow the **BC** to be released. The Architect will release the approved documents once any outstanding fees have been paid.

Full and Final **FHL** Material payment will be requested via invoice upon **SST** receiving notice of any **RFI** during the consent process, as this generally indicates that consent is just around the corner, payment of this amount is not due until BC has approved. Upon receiving the **RFI** notice **SST** will contact the **CP** or client builder to confirm 1<sup>st</sup> lot of material delivery dates and start preparing our purchase orders.

As soon as final material payment has been received and delivery dates locked in with CP/client builder **FHL** will press go on the release of all Purchase Orders and send an unpriced copy to the CP or client builder.

**FHL** will manage the construction process in line with the **CP**/client builder and update the build schedule via Rave Build through the job scheduling Gantt chart.

Communication during the build – Joanie will communicate weekly with your client for the duration of the build to ensure they are kept up to date and happy with progress, Kathryn will communicate weekly with the builder, confirm progress on site, address any issues and confirm upcoming deliveries and ensure they are in line with build progress, request build photos. If any deliveries need to be amended Kathryn will communicate directly with supplier and builder

At this point you can invoice **FHL** for your final Commission Payment.

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### GENERAL INFO INFORMATION

A unique selling point for our FHL Homes is that they are designed and specified to a Very High Wind Zone. We can also offer an upgrade to Coastal Marine Environment Package for all required fixings and products suitable for the most severe NZ Climates (excluding Snow Load Zones). FHL Customer Service/Sales Team will have the zoning confirmed for you prior to sending you the lead.

#### Geotech Report

If this is a newly subdivided site it is now mandatory to have a **Site Specific Geotech Report**, this should have been provided as a part of the clients Sale and Purchase Agreement. If the client requires a Geotech Report you will need to manage this

with your client, they may have a contact who can undertake this or FHL can provide contacts. It is advisable to call around and obtain a few quotes as prices and timeframes can vary quite significantly between companies.

NOTE: This process may take up to 6 weeks to obtain report and review, our advice to your client is upon receiving the Site Assessment Report from JBA it is advisable to get this process underway very early on to avoid this delay.

#### Variations once FWD commenced

Ideally there are to be no variations after the deposit has been received and FWD have commenced that effect the structural details other than for the adjustment of any P Sums allowed in the Estimate/Quotation.

If the client requests any minor variations to the material supply once **FWD** has commenced this will generate the need for possibly amended working drawings and further admin. There will be a minimum admin fee of \$500.00 GST incl for all variations requested after this point. This fee is to be paid in advance to prepare the variation at the time the variation is requested.

#### Indicated Time Frames for the above processes. (excluding weekends and public holidays)

- 2 working days to receive the **FHL Estimate with NO material, upgrade and colour schedule** completed and indicative **CP** costs if based on standard plan – this is inclusive of no changes to standard plan and 1 estimate request only.
- 5 working days to receive the **FHL Estimate/s** inclusive a completed **material, upgrade and colour schedule** indicative **CP** Costs, based on a standard plan only and 1 estimate request only.
- 3 weeks to receive **OFF SITE FWD, FHL material supply quotation and CP** quotation from date deposit is received (excluding weekends and public holidays)
  - An additional 1 week to receive completed **OFF SITE BC** Application ready to be lodged (Approx 4 weeks to receive the **OFF SITE BC** approval)
  - An additional 2 weeks to receive completed **ON SITE FWD** and **ON-SITE BC** Application and lodge, providing no delay in obtaining engineering or additional Site Reports (Approx 4 to 6 weeks to receive **ON SITE** consent – pending RFI/s and work required to resolve these)
- 4 to 6 weeks lead time to arrange material supplies and delivery to site upon issue of **OFF SITE** or **ON SITE** building consents.
- 6 to 10 weeks construction time for a 15 – 50m<sup>2</sup> home prior to delivery to site
- 12 to 15 weeks construction time for a 50 - 104m<sup>2</sup> home prior to delivery to site