



## Sales Workflow – Email Templates

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### **Preliminary Agreement 1**

At the time of your sales consultation present the Preliminary Agreement 1 letter and Preliminary Agreement form for the client to sign. Explain the next steps of the process. Ideally, the client will sign the Preliminary Agreement form but in some instances you may need to send the Preliminary Agreement by email. See template below to be printed in letter format on your franchise letterhead to be presented in person or sent by email.

### **Preliminary Agreement Letter Template**

Hi [name]

Thank you for meeting with me to discuss your new home building project. As discussed during our meeting, for us to move forward with your plans, the next step for you is to sign the Preliminary Agreement and pay the preliminary fee.

### **Preliminary Agreement Form**

Please sign and return the attached Preliminary Agreement form which covers the following services:

1. Concept/design meeting/s
2. Concept design plans and siting
3. Contour Survey of the site
4. Soil test (to assess what foundation and site costs may apply)
5. Detailed New Home Proposal with itemised cost analysis

### **Preliminary Agreement Fee**

We have provided bank details below for payment of preliminary fee by EFT:

Account Name:  
BSB:  
Account Number:  
Amount:

The preliminary fee is non-refundable and covers the cost of services listed above. The total amount of the Preliminary Fees is deducted from the building contract amount. If you choose not to proceed the soil test and contour survey will be provided to you.

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### *Preliminary Agreement<sup>1</sup> Letter Template cont...*

#### **What's Next?**

These preliminary stages can be sometimes be a lengthy process but we want you to be 100% happy with your design, inclusions and selections. It is important to remember, that the more changes you make, the longer the process will take. We don't mind but be aware of the time frame and requests made to the builder. Ensuring you are starting with clear concept ideas and sketches can make a difference.

We will provide regular updates to you throughout these preliminary stages to ensure you remain informed of each stage and to provide you with a personalised and transparent service ensuring David Reid Homes will complete your project to an exceptional standard.

We look forward to receiving the signed Preliminary Agreement and payment of the fee to start the next step of building your new home.

Kind regards

First Name Surname

Title

David Reid Homes [franchise name]

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