PERSIMMON
Together we make a home

Site Sales Admin System

Broker Training Manual

Version 5
Wednesday, 14 December 2016

Background

As one of Persimmon's nominated brokers you play an important part in the sales process of each of our homes. This document explains the steps required of you to ensure that the process is as quick and efficient as it can be for both parties.

The URL is crm.persimmonhomes.com/Brokers/signIn and you will require a password.

Procedure for existing Brokers

Enquiry e-mails will be sent to you as normal. When you click the link, you will automatically be logged into the Dashboard. You will need to select the 'Account' tab and create a password. If you omit to do this and click the link in the e-mail again, you will be directed to the login screen where you can click 'Forgotten Password' and a new password will be sent to you.

Procedure for new Brokers

When new Brokers are added to the system an e-mail is generated and sent with a password and login details.

Data Protection

SAS is a securely hosted, powerful online system that contains the contact details of existing prospects.
The password must conform to data protection best practice, so please do not leave login details and passwords in the office.

Confirmation Email

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From: Karen Castle
karen@designamite.co.uk

Dear Karen Castle

As one of our selected brokers, you must acknowledge receipt of this email within 24 hours, and schedule an appointment or phone call with the client ASAP.

Personal Details

Name	Mrs Kathrine Sarah Preece
Email address	kathrine.preece@btinternet.com
Mobile telephone number	07855966842
Day telephone number	01603 667081
Address line 1	Flat 2
Address line 2	17 Unthank Road
City	Norwich
County	Norfolk
Postcode	NR2 2PA
Investor	No

Specific Interests

Brand	Persimmon Homes
Region	Anglia
Development	Bluebell Meadow
Plot interest(s)	Plot 005, 3 Bed Mid Terrace House, £179,950

Further details about the prospect are available online.

Confirmation

You must acknowledge receipt of this email

1 Confirm

Schedule or Amend

To schedule/amend an appointment or phone call

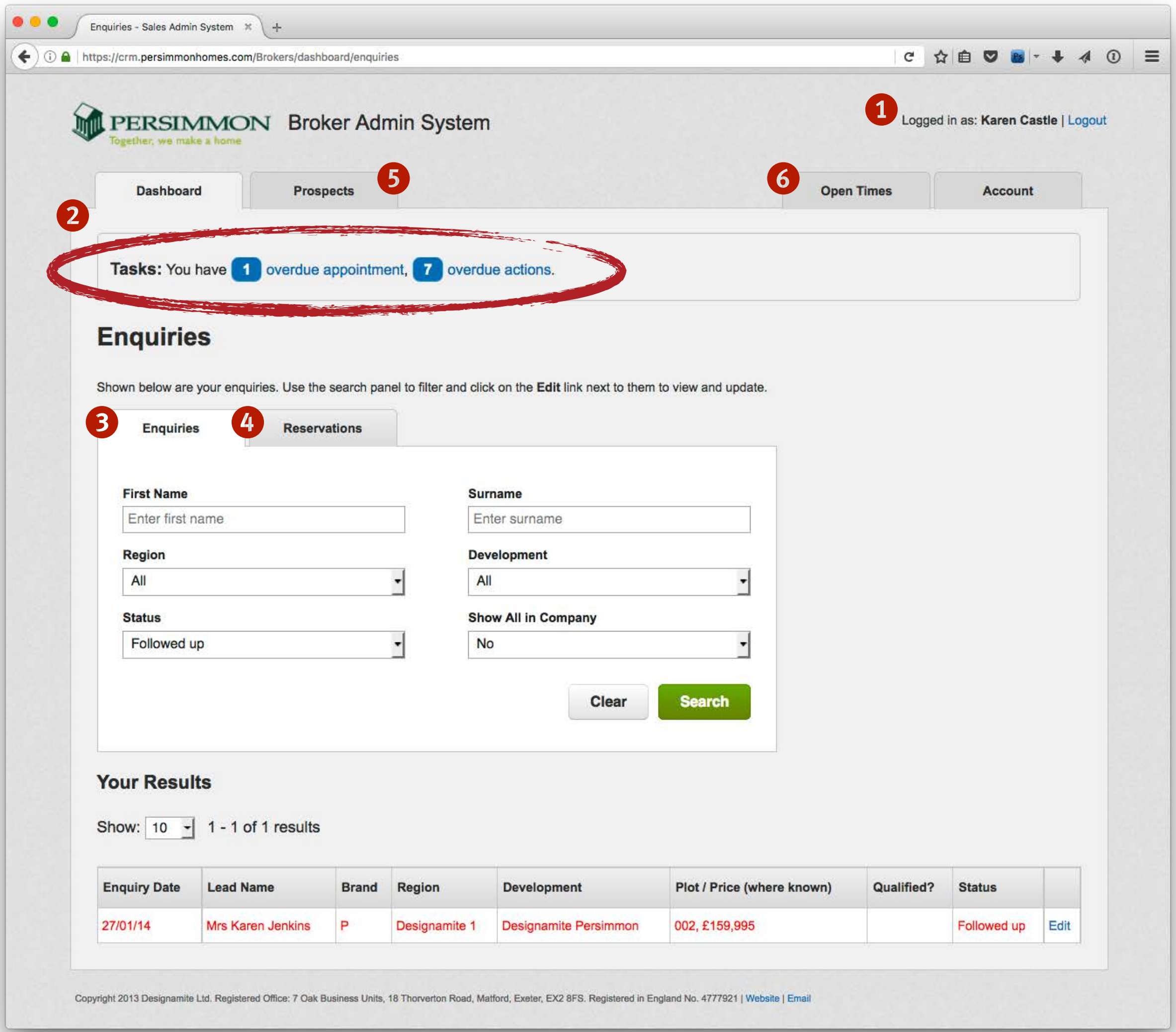
2 Schedule

When a Sales Advisor from the Persimmon group of companies has a customer that requires a Broker, you will receive an email, similar to above, containing the customer details. You will also be able to view the enquiry on your dashboard (See Page 4).

1. Select ‘Confirm’ to acknowledge receipt of the email.

2. Select ‘Schedule’ to schedule or amend an Appointment/Phone call.

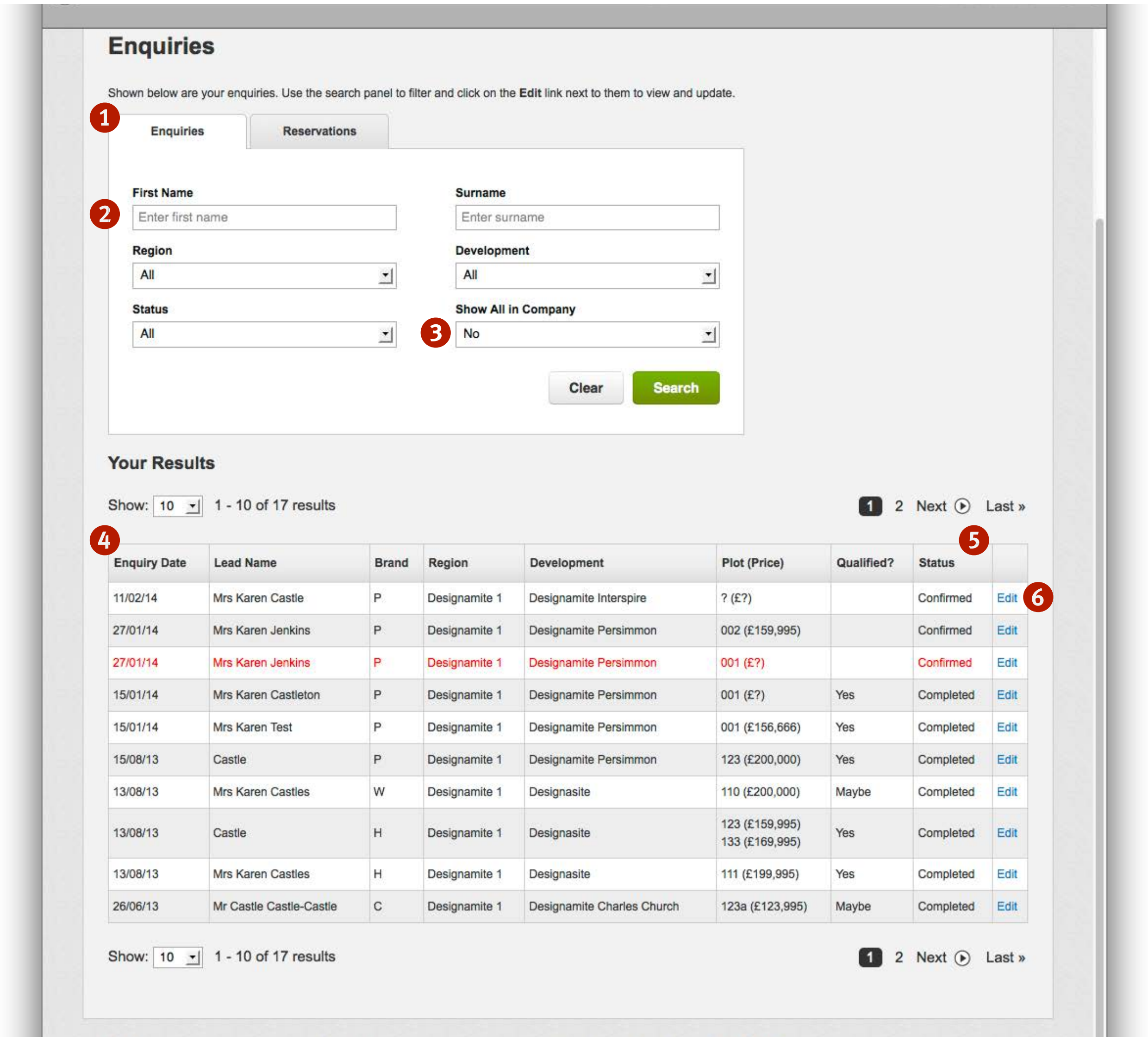
Dashboard Overview



The Dashboard is where you manage your Enquiries and Reservations.

1. Your name is displayed in the top right corner. You can Logout from here.
2. Tasks - these are your tasks, including overdue actions. Click the links to view details.
3. Enquiries tab - loads by default and contains all referrals (sent by email).
4. Reservations tab - contains your Reservations and Key Dates.
5. Prospects tab - Search/edit/create prospects.
6. Open Times tab - your firm’s business hours, amendable by managers/regional admins and broker.

Dashboard - Enquiries



1. The Enquiries tab is where you manage your referrals.

2. Filter by Name, Region, Development or Status.

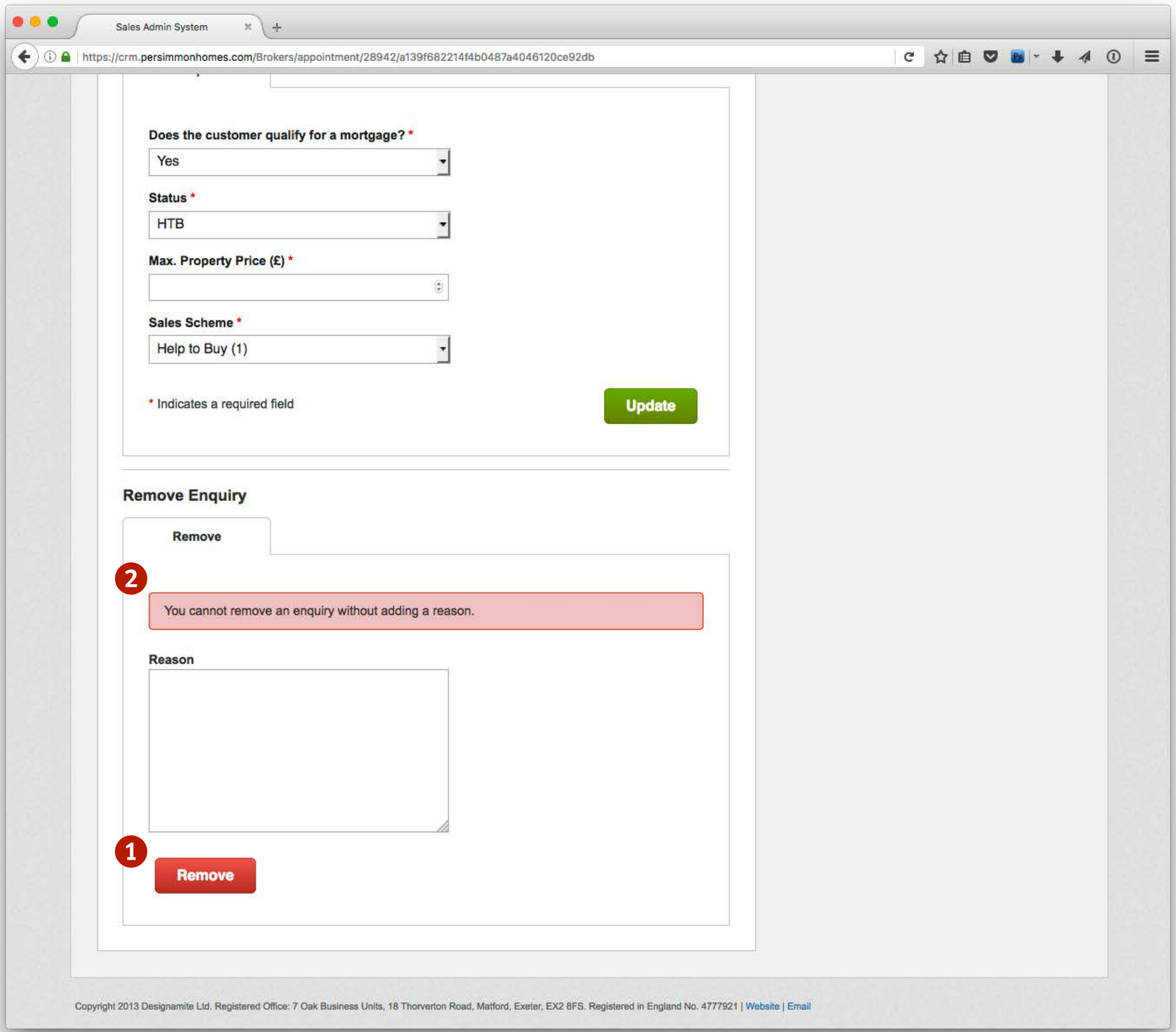
3. Show all in Company - by default, only Enquiries linked to your login are shown.
You can view all Enquiries linked to your Company by selecting 'Yes' in the drop down.

4. Enquiries are displayed in date order (most recent first). Overdue actions appear in red.

5. Status is the current status of the Enquiry.

6. Select 'Edit' to view, update and/or remove the Enquiry.
Use this to confirm receipt of the enquiry if you have not already done so via email.

Dashboard - Enquiry Removal



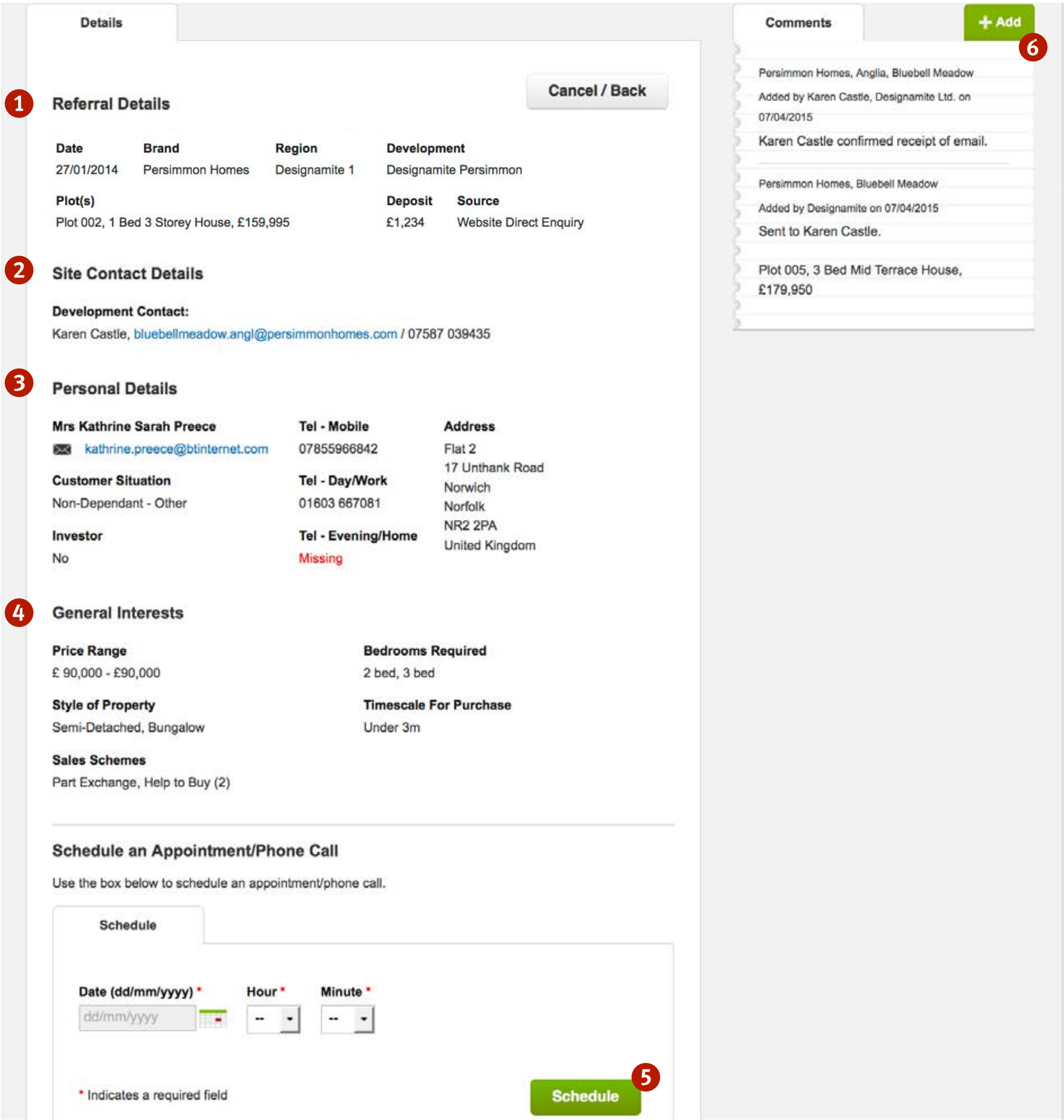
In the event the enquiry is no longer proceeding with you, it can be removed from your list of actions.

1 Click ‘Remove’ to confirm removal of Enquiry

2 A reason must be given to complete the removal

Removing the appointment means it will no longer appear in the Enquiries tab or Overdue Tasks..

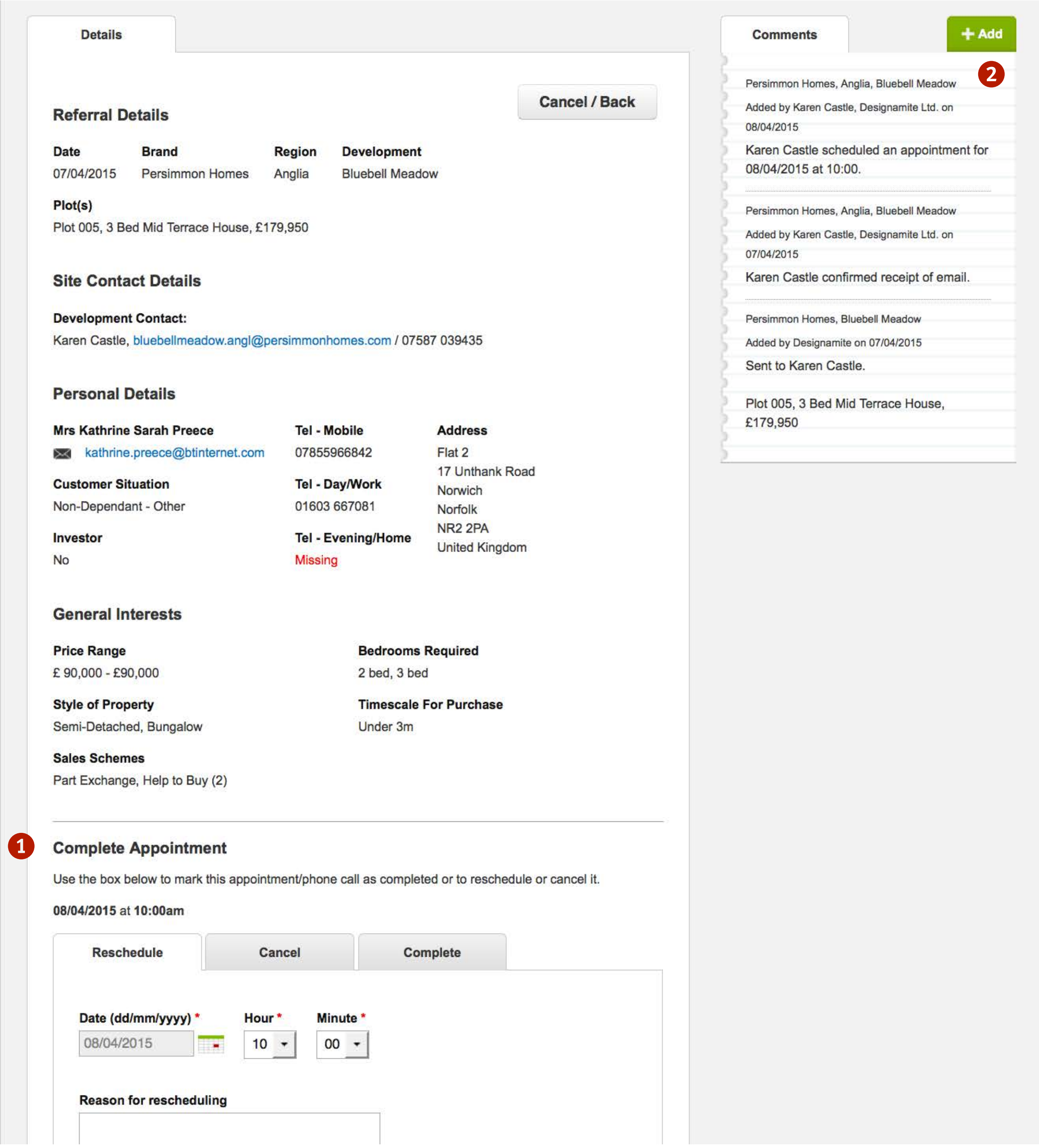
Receipt Confirmed & Schedule Appointment/Call



The next step is to schedule an Appointment/Phone Call with the customer.

1. Referral Details (Date, Site, Plot, etc) - If the source is 'Website Direct Enquiry' a deposit will also feature.
2. Site Contact Details (Email and/or Tel if known).
3. Customers Personal Details including Investor Status and situation (FTB etc).
4. Customers Interests (Price range, sales schemes, timescale etc).
5. Select a Date and Time and click 'Schedule' to confirm (You cannot schedule an appt/call in the past).
6. Click the green '+Add' tab to add a Comment. This comment will be seen by the Sales Advisor at the appropriate development.

Appointment/Phone Call Scheduled

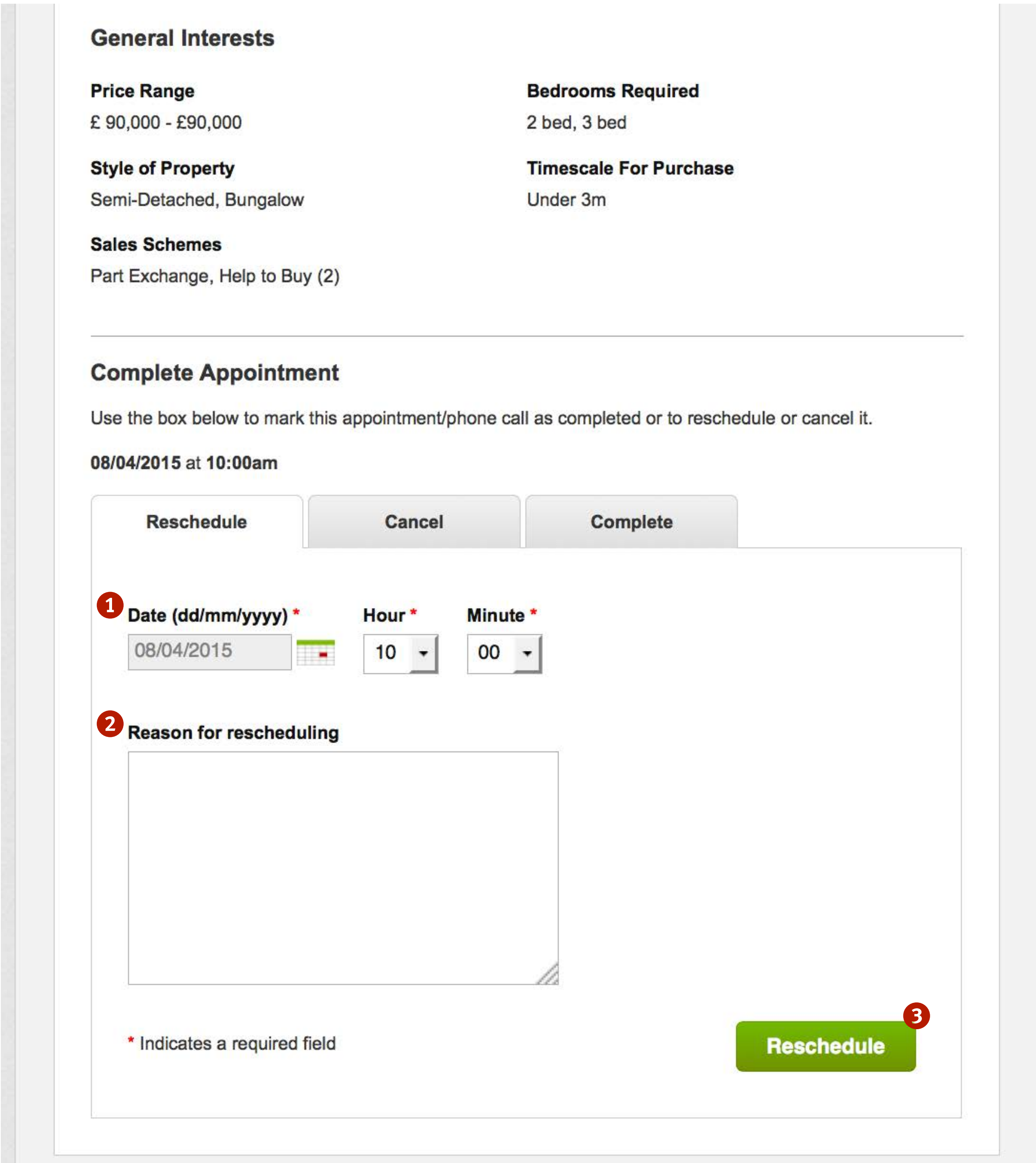


When you have ‘Scheduled’ an Appointment/Phone Call you will see the above confirmation screen.

1. Here you can Reschedule, Cancel or mark an appointment as Complete.

2. Your Comments & actions are captured in the ‘Comments’ section.

Reschedule an Appointment/Phone Call

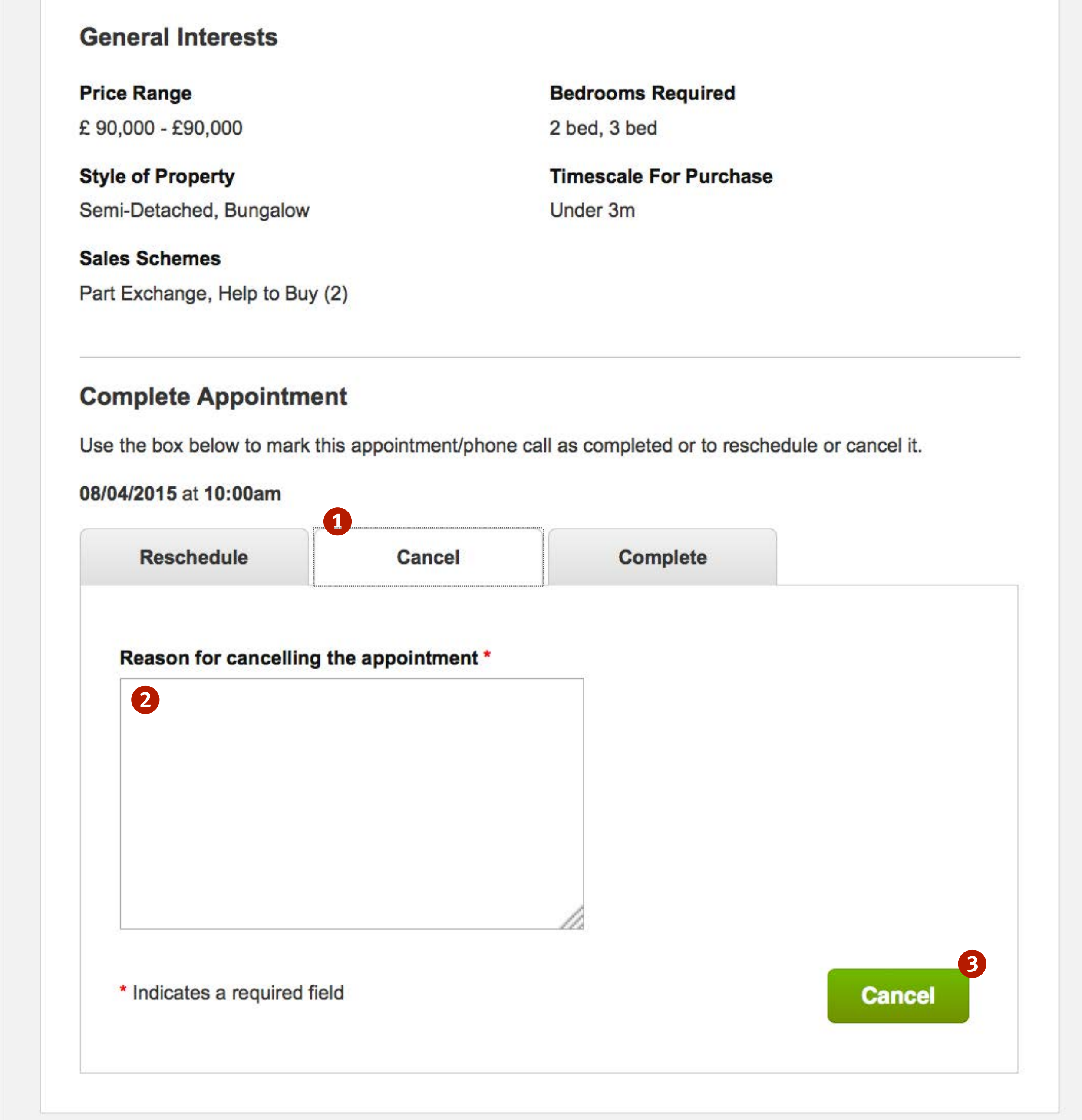


1 Select 'Reschedule' tab to change the Date or Time of the Appointment/Phone Call.

2 Add reason for Rescheduling.

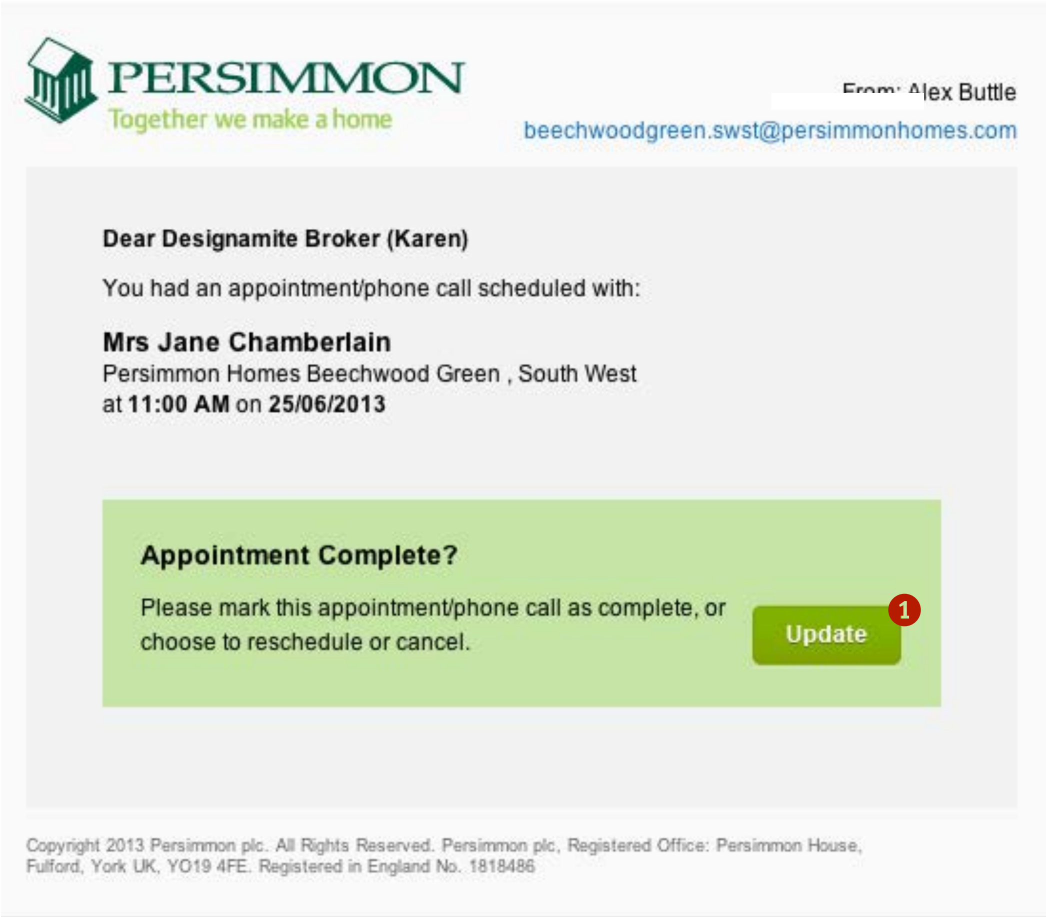
3 Select 'Reschedule' to confirm/save.

Cancel an Appointment/Phone Call



1. Select 'Cancel' tab to cancel the Appointment/Phone Call.
2. Add reason for Cancelling - comments are mandatory.
3. Select 'Cancel' to confirm/save.

Appointment/Phone Call - Confirmation Email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From: Alex Buttle
beechwoodgreen.swst@persimmonhomes.com

Dear Designamite Broker (Karen)

You had an appointment/phone call scheduled with:

Mrs Jane Chamberlain
Persimmon Homes Beechwood Green , South West
at **11:00 AM** on **25/06/2013**

Appointment Complete?

Please mark this appointment/phone call as complete, or choose to reschedule or cancel.

1 Update

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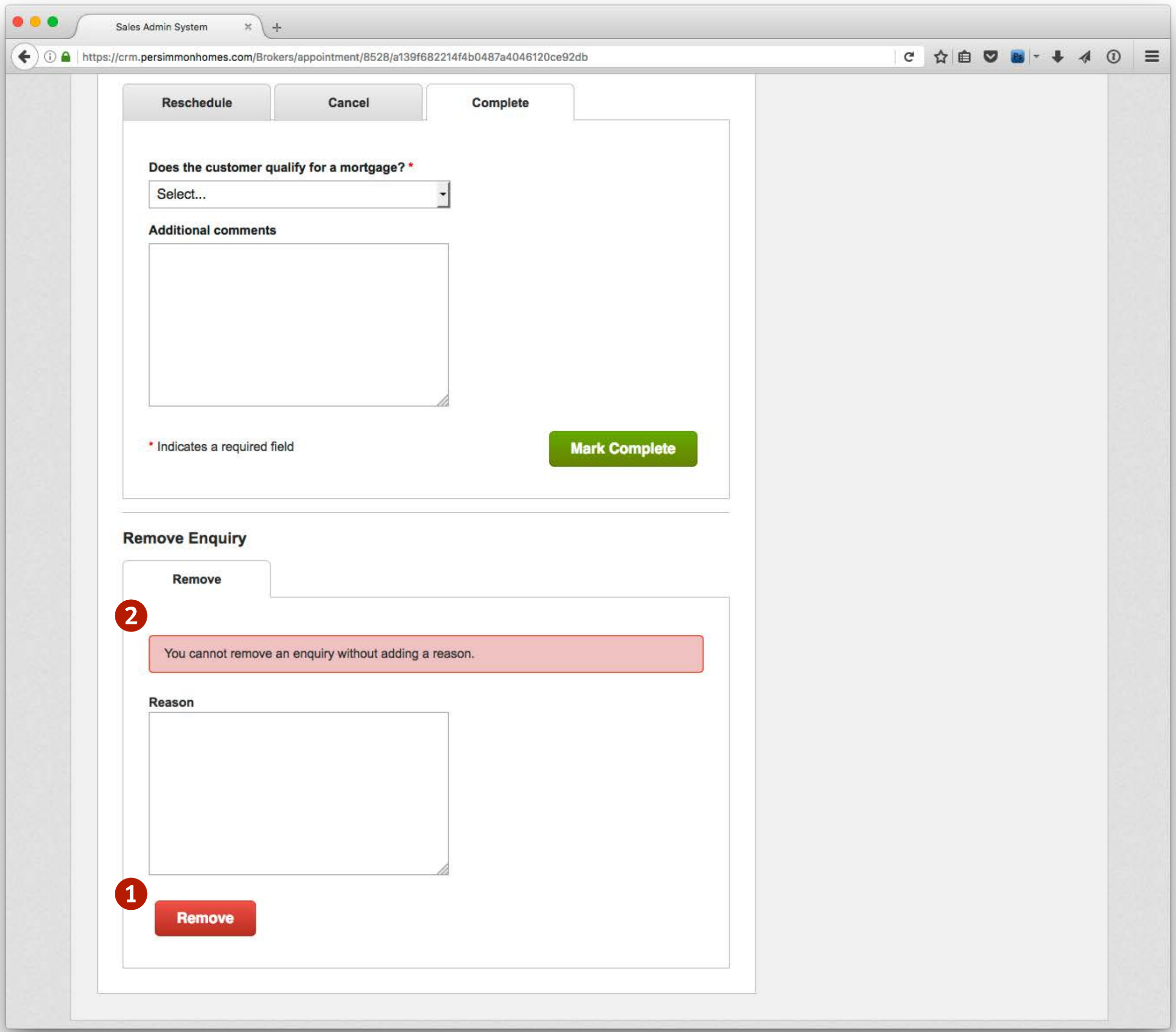
When the appointment time has passed, you should receive an automated email asking you to update the customers details.

1. Select ‘Update’ to mark the Appointment/Phone Call as complete or to Reschedule/Cancel.

Remove Appointment

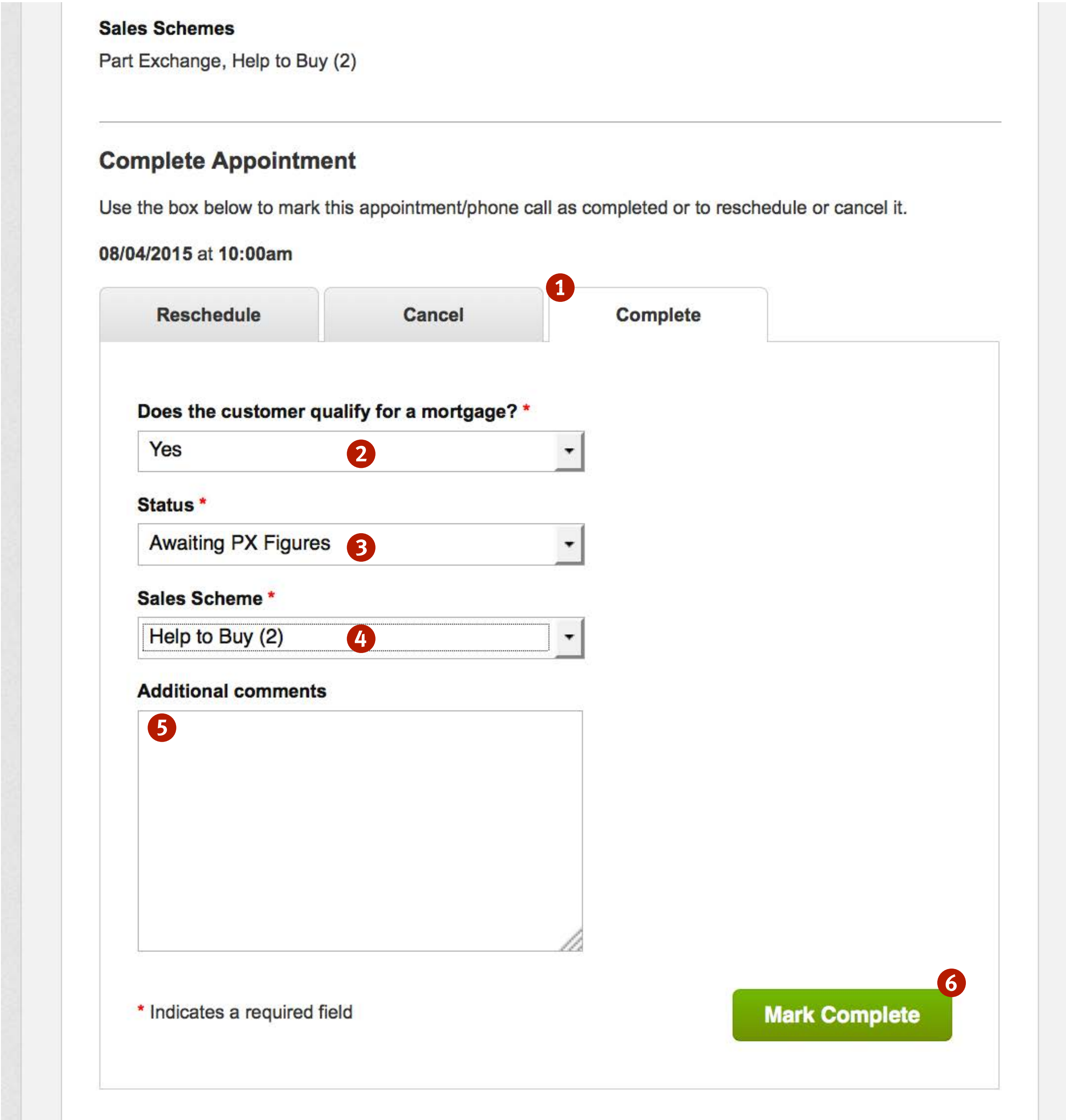


1. Click 'Remove' to confirm removal of Appointment

2. A reason must be given to complete the removal

Removing the appointment means it will no longer appear in the Enquiries tab or Overdue Tasks..

Complete Appointment



1. Select ‘Complete’ tab to mark the appointment as Complete.

2. Mortgage Qualification - select Yes or No from drop down. You can update at any time.

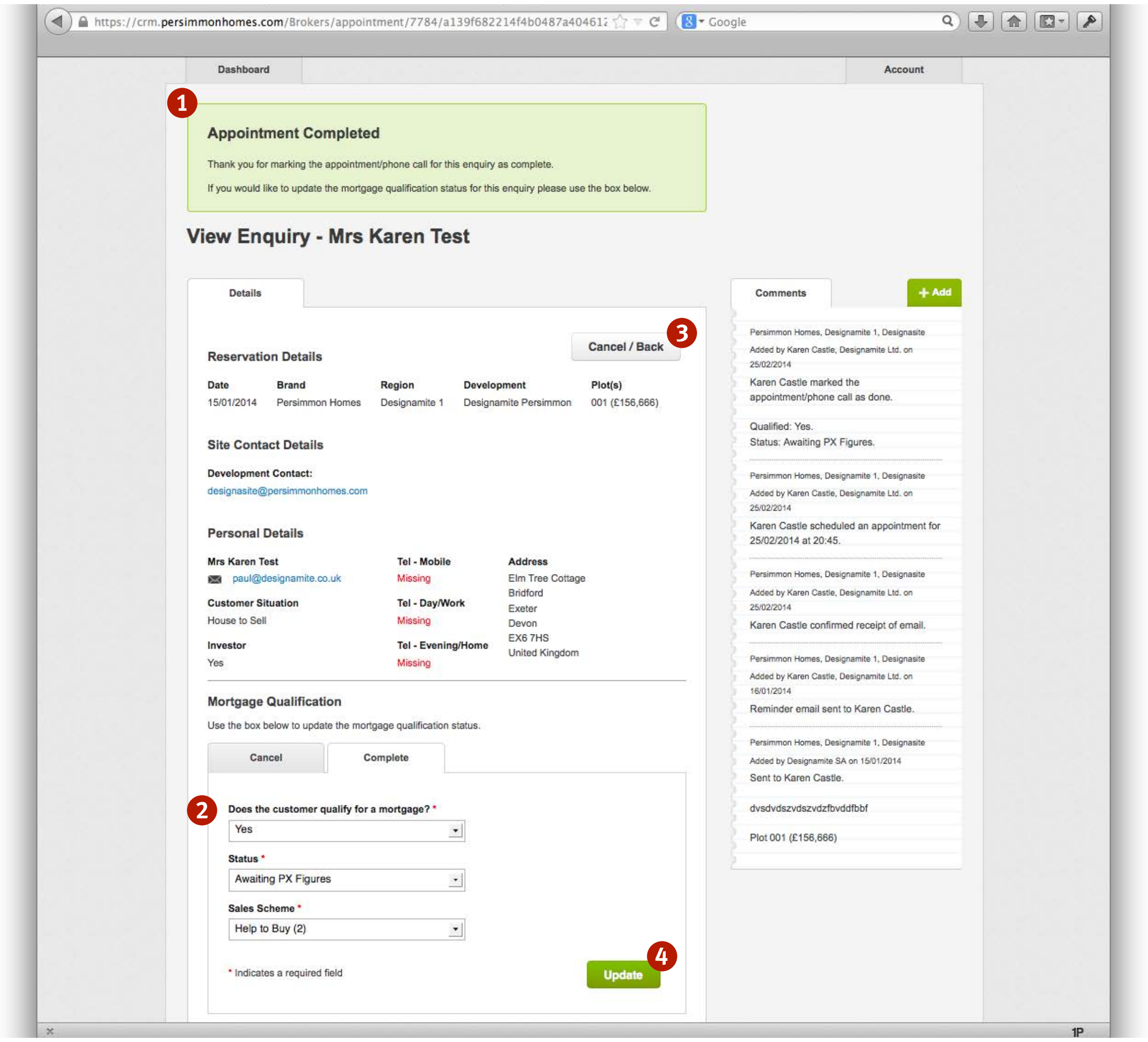
3. Select customer status from the drop down.

4. If you select ‘Yes’ to mortgage, select the Sales Scheme. This information will populate the customers Reservation form.

5. Add ‘Comments’.* ***See Page 13***

6. Select ‘Mark Complete’ to confirm/save.

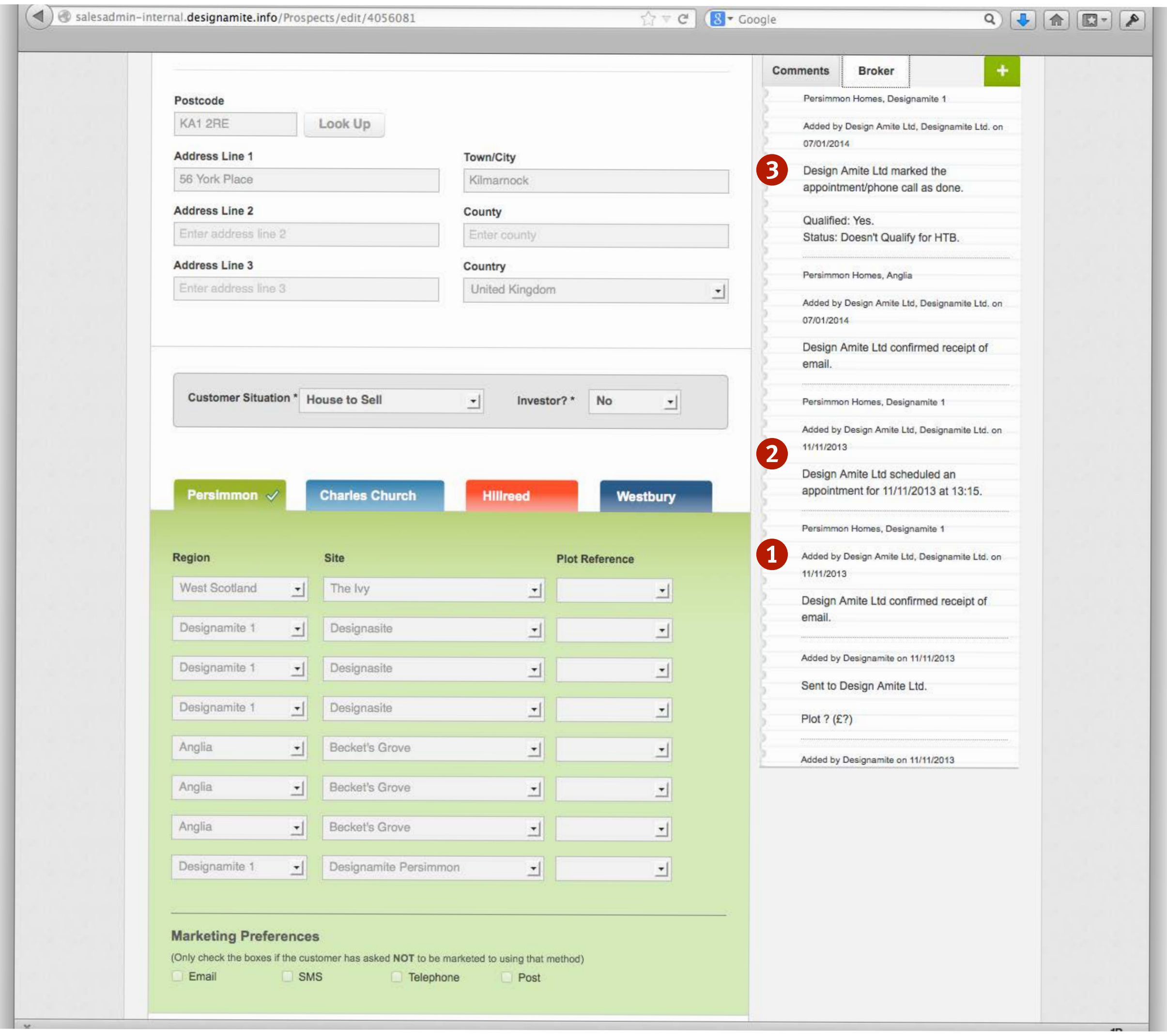
Update Mortgage Qualification



When you have marked an appointment/phone call as complete, you will see the above confirmation screen.

1. Confirmation feedback.
2. You can change the Qualified status at any time.
3. Select Cancel/Back to return to the Dashboard.
4. Select 'Update' to Save.

Your Comments



Your comments are captured in the ‘Comments’ section of the customer details for the Sales Advisor to see. This is an example of how it looks.

1 Broker Request - Confirmed Receipt.

2 Broker Request - Scheduled Appointment.

3 Broker Request - Appointment Completed.

Reservations

Reservation Agreement by Email

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Reservation Agreement

Page 1 of 2

Mr Test test test
2 Blackthorn Avenue
Tiverton
EX16 6TY
United Kingdom

Sarah Scriven (Regional Administrator)
Persimmon Homes Anglia
Persimmon House
Colville Road Works
Oulton Broad, NR33 9QS

Tel: 01502 516784
sarah.scriven@persimmonhomes.com

Tuesday 25th February 2014

Dear Mr test

Thank you for reserving your new Persimmon home. Your reservation agreement is detailed below and your payment will now be processed.

1 **Plot No. 276 - Becket's Grove**
t - 01953 602 142, e - becketsgrove.angl@persimmonhomes.com

Property Address 8 Harvey Close Wymondham Norfolk NR18 0WH	**Estimated Build Date** Mar 15 - Apr 15 **House Type** 4 Bed Detached House	**Release Price** £243,950 **House Type Name** N/A	**Purchase Price** £235,666 **Gross Area (sq ft)** TBC
Tenure Freehold	**Parking Spaces** 0	**Garage** None	**Garage Tenure** N/A
Ground Rent N/A	**Service Charge** N/A	**Garage Ground Rent** N/A	**Garage Service Charge** N/A

2

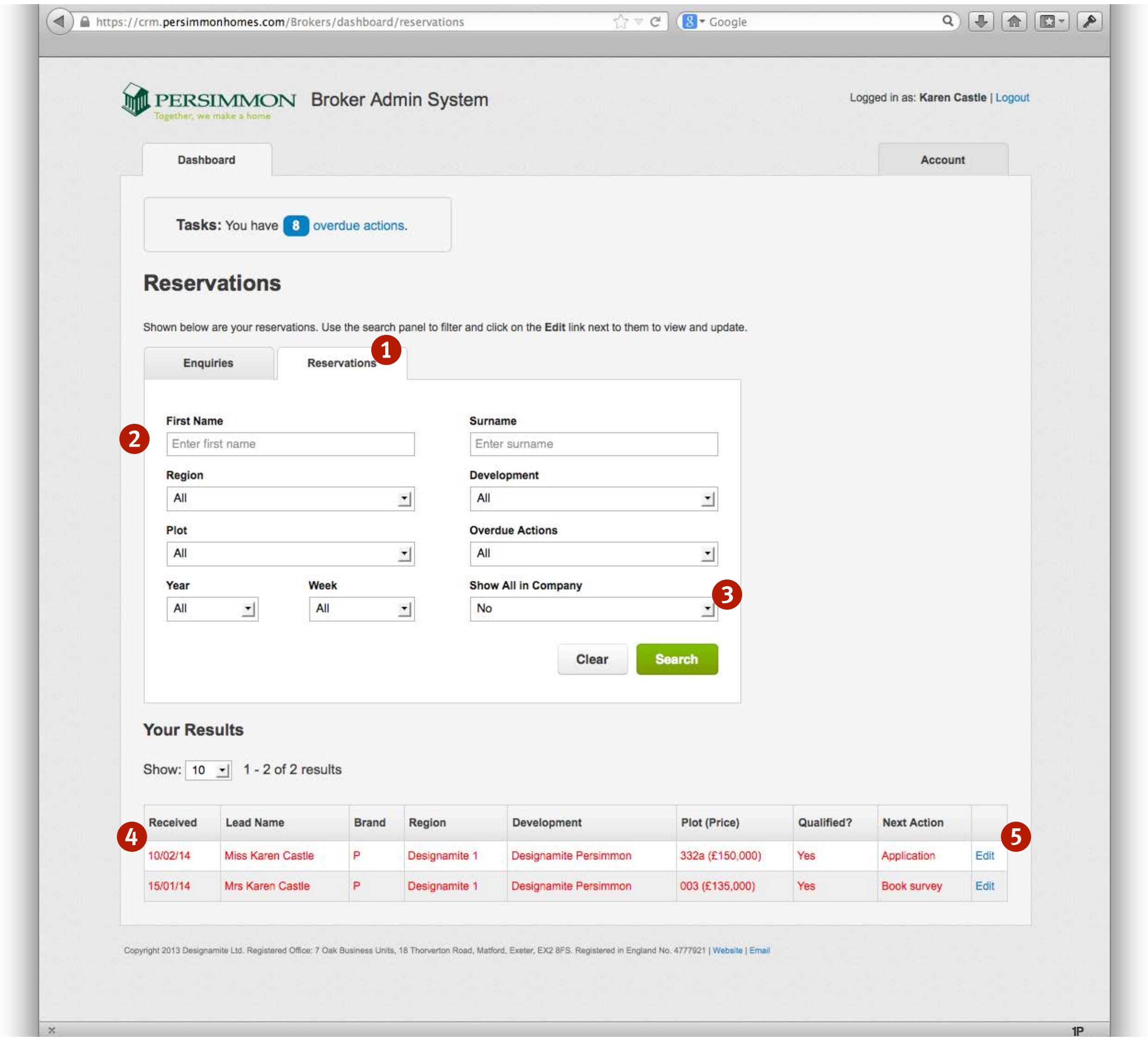
Sales Schemes Part Exchange	**Incentives** N/A	**Reservation Fee Paid:**	**£250**
Property Address 2 Blackthorn Avenue Tiverton EX16 6TY	**Promo Code** N/A	**Non-Refundable:**	£99
		Reservation Date:	31/01/2014
	Agreed Price TBC	**Reservation Expiry:**	17/03/2014
		Payment Type:	Card

When a customer Reserves you will receive an email of the Reservation form shown above. The customers' details will also appear in the Reservations tab (See Page 15).

1 Site, Plot Details and Customer Information.

2 If a Sales Scheme is selected (e.g. Help to Buy), it will be shown here. You can update this information on your Dashboard at any time.

Dashboard - Reservations



1. The Reservations tab is where you manage your Reservations.

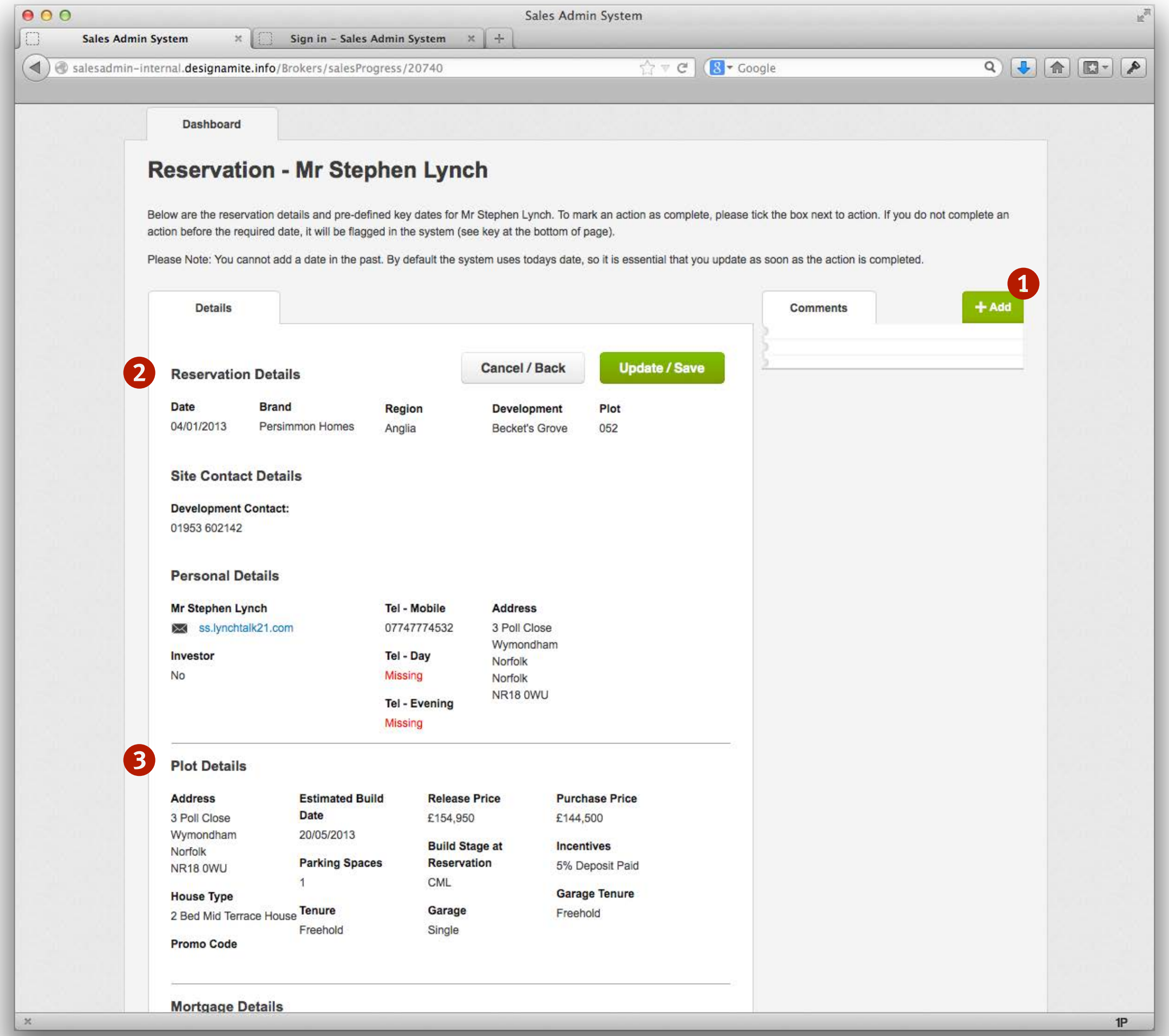
2. Filter by Name, Region, Development, Plot, Date or Action.

3. Show all in Company - by default, only Reservations linked to your login are shown.
You can view all Reservations linked to your Company by selecting ‘Yes’ in the drop down.

4. Reservations are displayed in date order (most recent first).
Overdue actions are shown in red, with the next action listed.

5. Select ‘Edit’ to view and/or update.

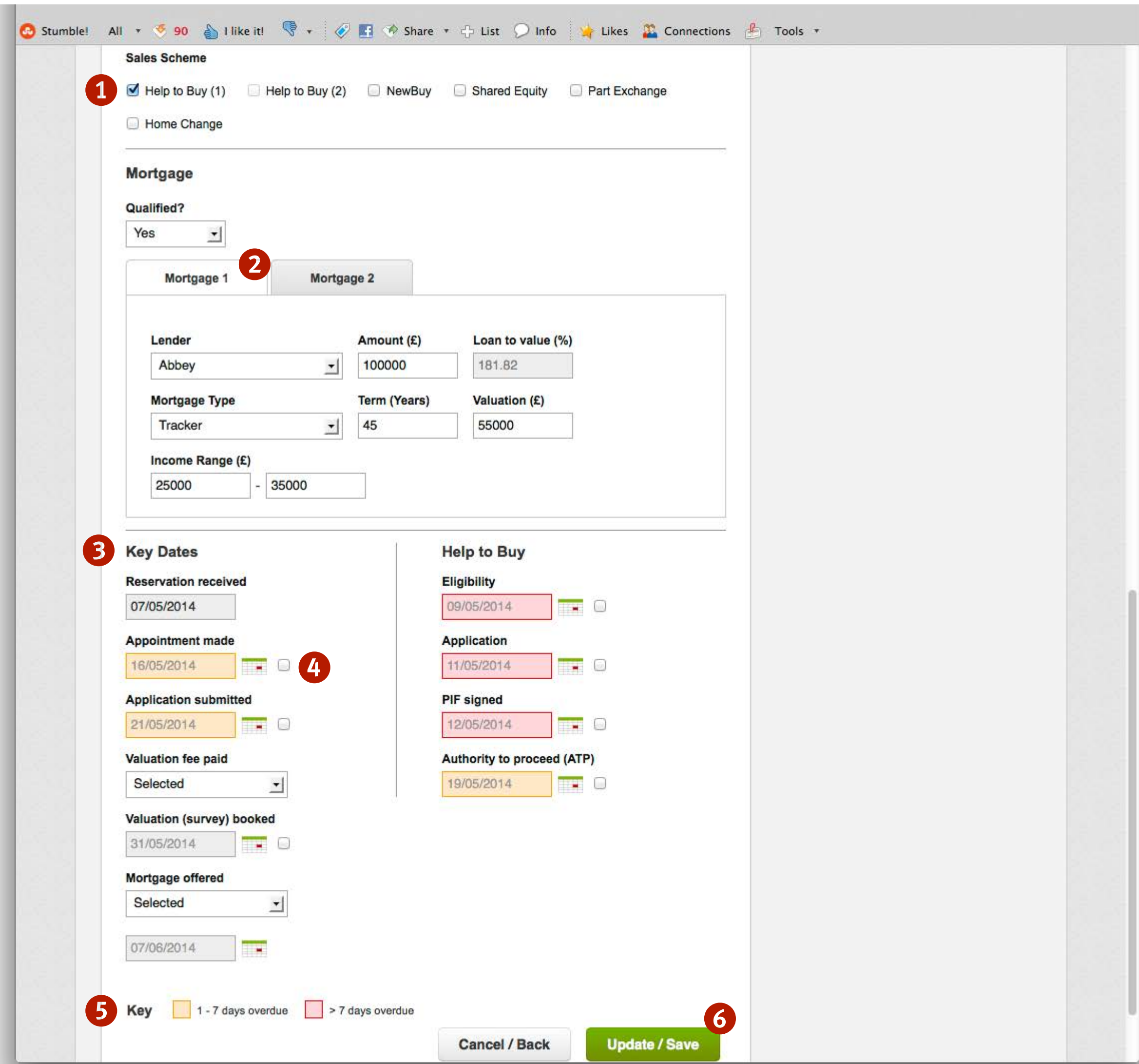
Reservations Details



When you 'View' a reservation you will see something similar to the screenshot above.

1. Click the green '+Add' tab to add a Comment to the customer's record. This comment will seen by the Sales Advisor at the relevant development.
2. Customer Reservation Details & Site contact information.
3. Plot information including purchase price and incentives if applicable.

Reservations - Sales Schemes, Mortgage Details & Key Dates



Scroll down to view Mortgage Details and Key Dates. Once qualified please select the Sales Scheme and enter the Lender, Mortgage Amount, Mortgage Type, Term & Valuation.

1 Sales Scheme - this may be pre-populated by the Reservation form.
If Help to Buy is ticked, you have 4 additional Key Dates to Complete.

2 Mortgage Details - these may be pre-populated by the Reservation form. Update or enter if empty.

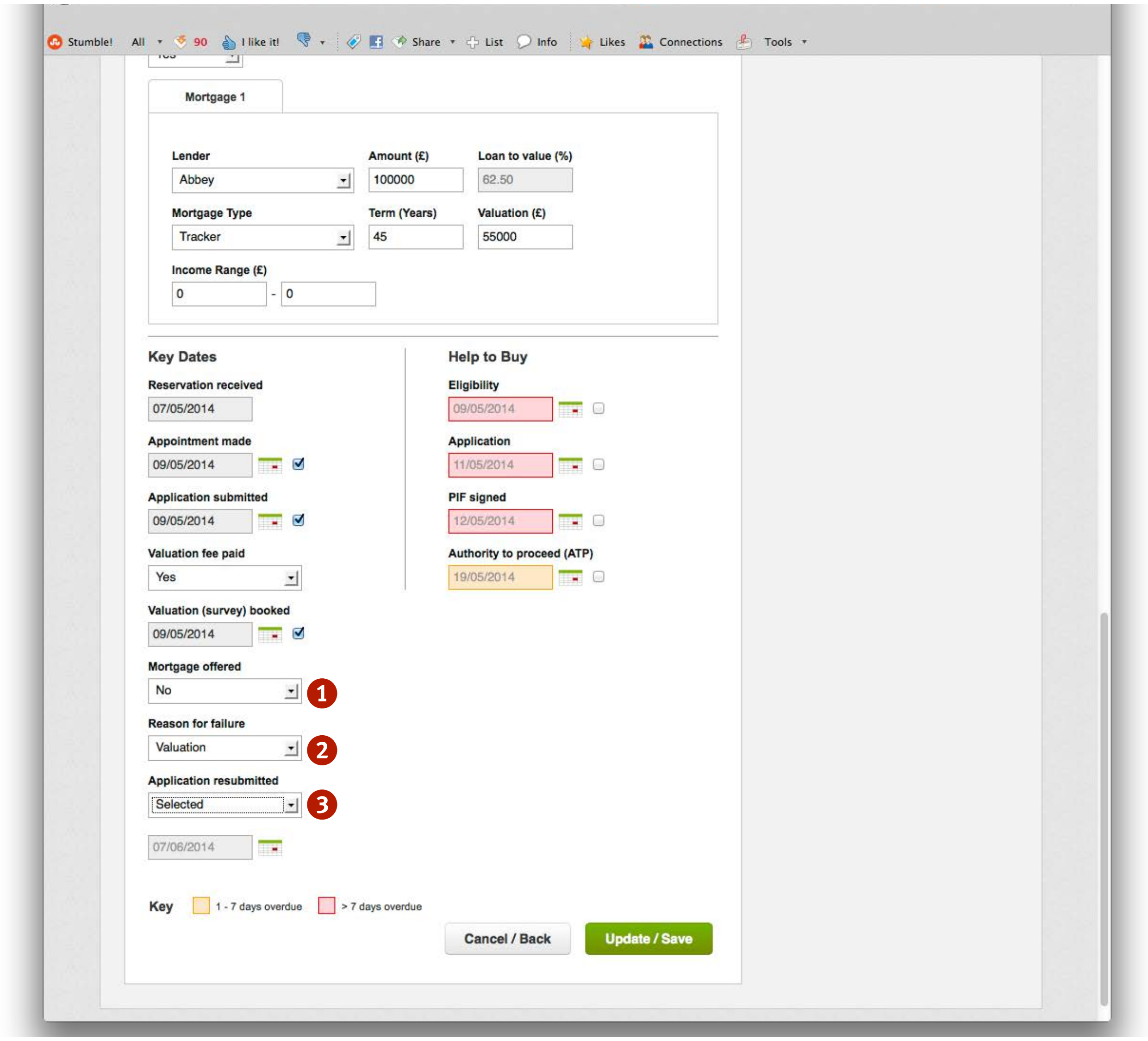
3 Key Dates - as predefined by Persimmon. You're required to enter the Key Dates for each completed stage. These dates are linked to the Sales Advisors Dashboard and Plot Overview page as part of the overall Sales Progress procedure (See Page 21).

4 Tick the box against each step to mark as complete. Sales Advisors will be notified of updates.

5 Key - Orange means the task is 1-7 days overdue, Red 7+ days.

6 Select 'Update/Save' when you have actioned something to save.

Reservations - Failed Mortgage Application/Resubmission



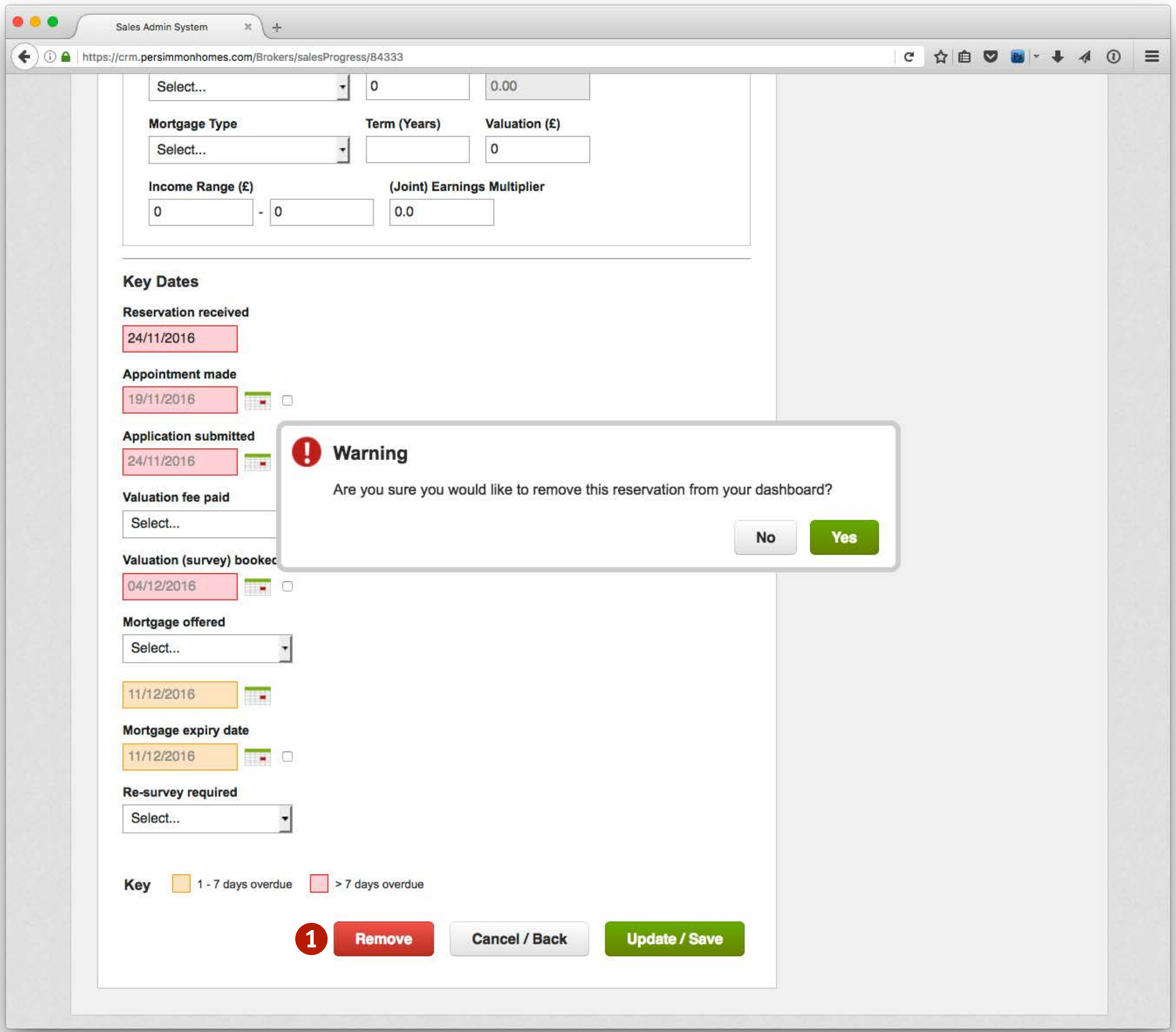
If the first Mortgage application fails, you have the option to submit a second application.

1 Mortgage Offered - select 'No' from the drop down.

2 Reason for failure - select the reason from the drop down.

3 Application resubmitted - select 'Yes' or 'No' from the drop down.

Reservations - Removal

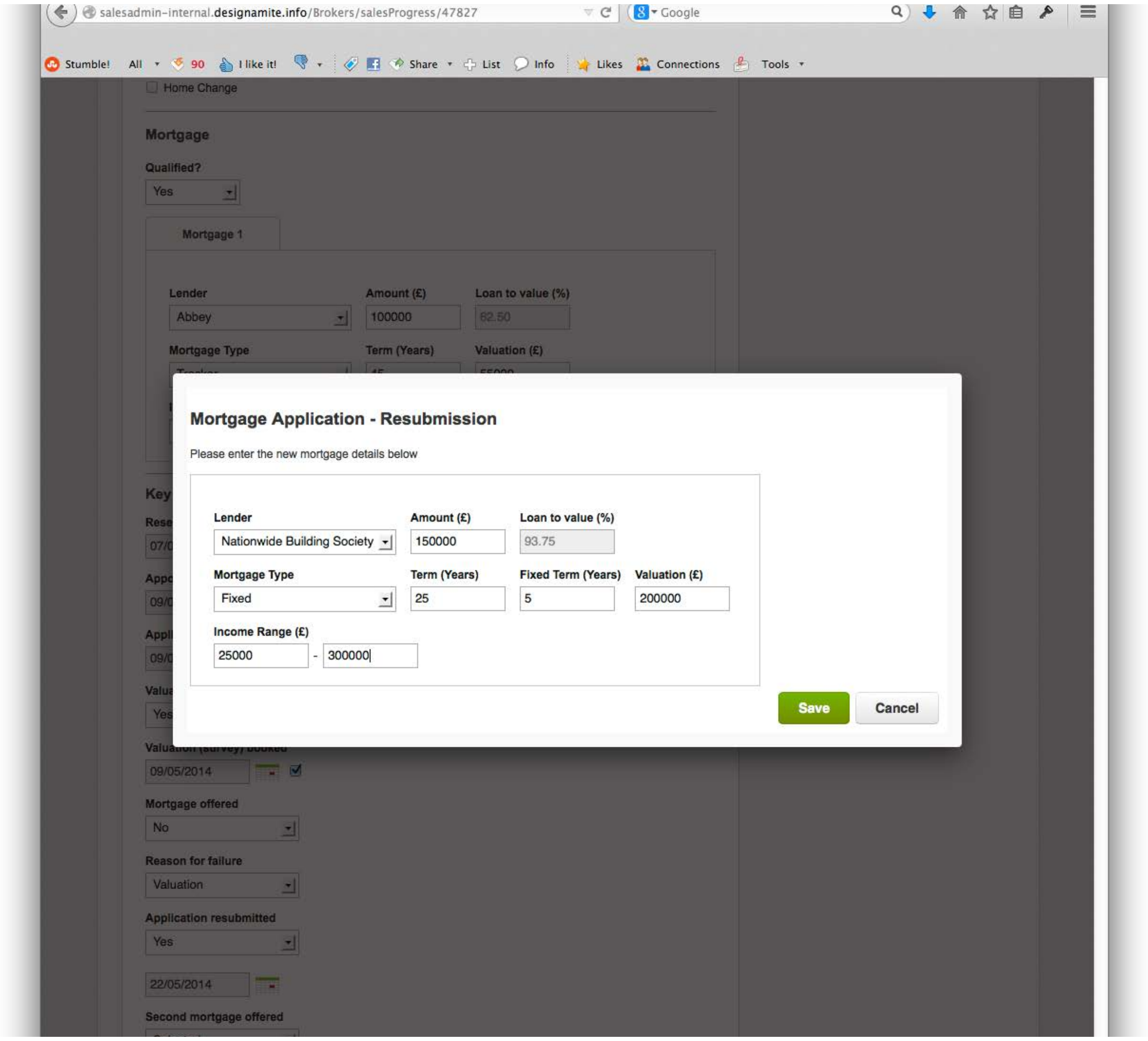


In the event a reservation is no longer proceeding with you, it can be removed from your list of actions.

1 Click ‘Remove’ to confirm removal of Reservation

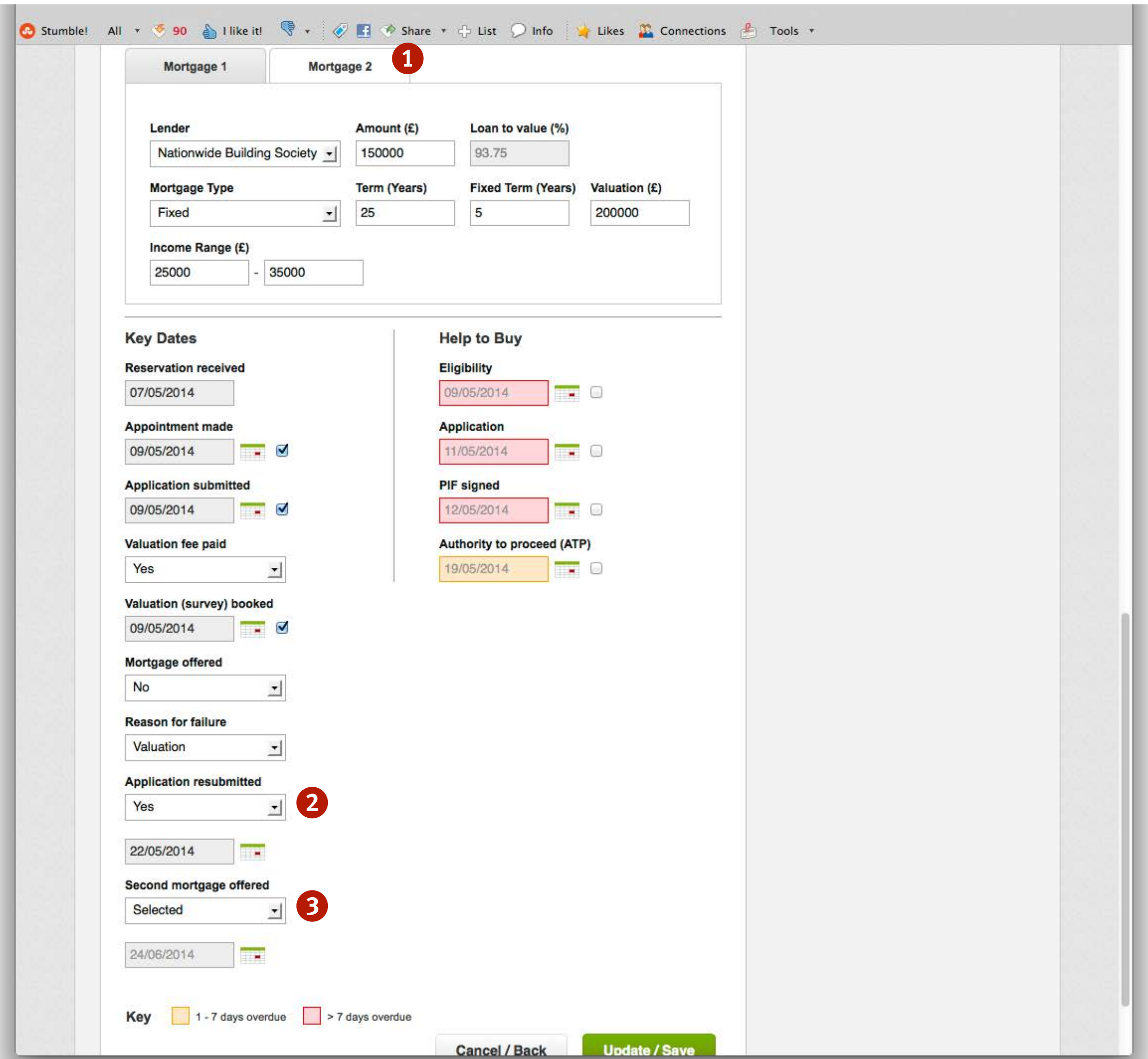
Removing the reservation means it will no longer appear in the Reservation tab or Overdue Tasks.

Reservations - Mortgage Application Resubmission



If you chose to resubmit a second Mortgage application, you will be prompted to enter the new mortgage application details. Click Save when complete.

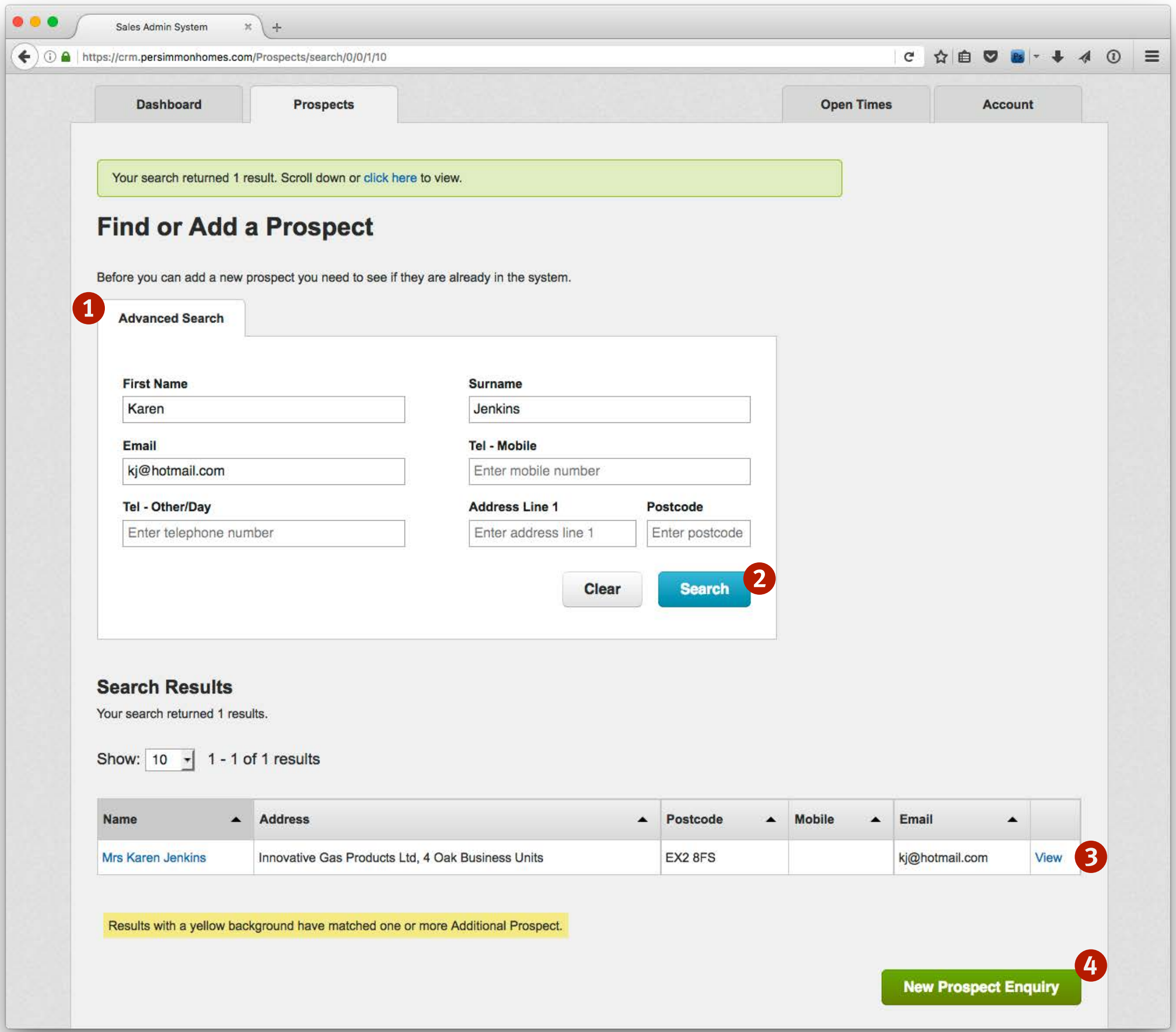
Reservations - Resubmission (Mortgage 2)



If you have chosen to submit a second mortgage application, a few more Key dates appear.

1. Mortgage 2 tab - this tab contains details of the second mortgage application.
2. The date is populated by the date the ‘Application resubmitted’ field was entered.
3. Second mortgage offered - select ‘Yes’ or ‘No’ from the drop down when received.

Prospects - Search



For referrals received by telephone you can add a prospect to the system to start processing the enquiry, without needing to wait for a referral email.

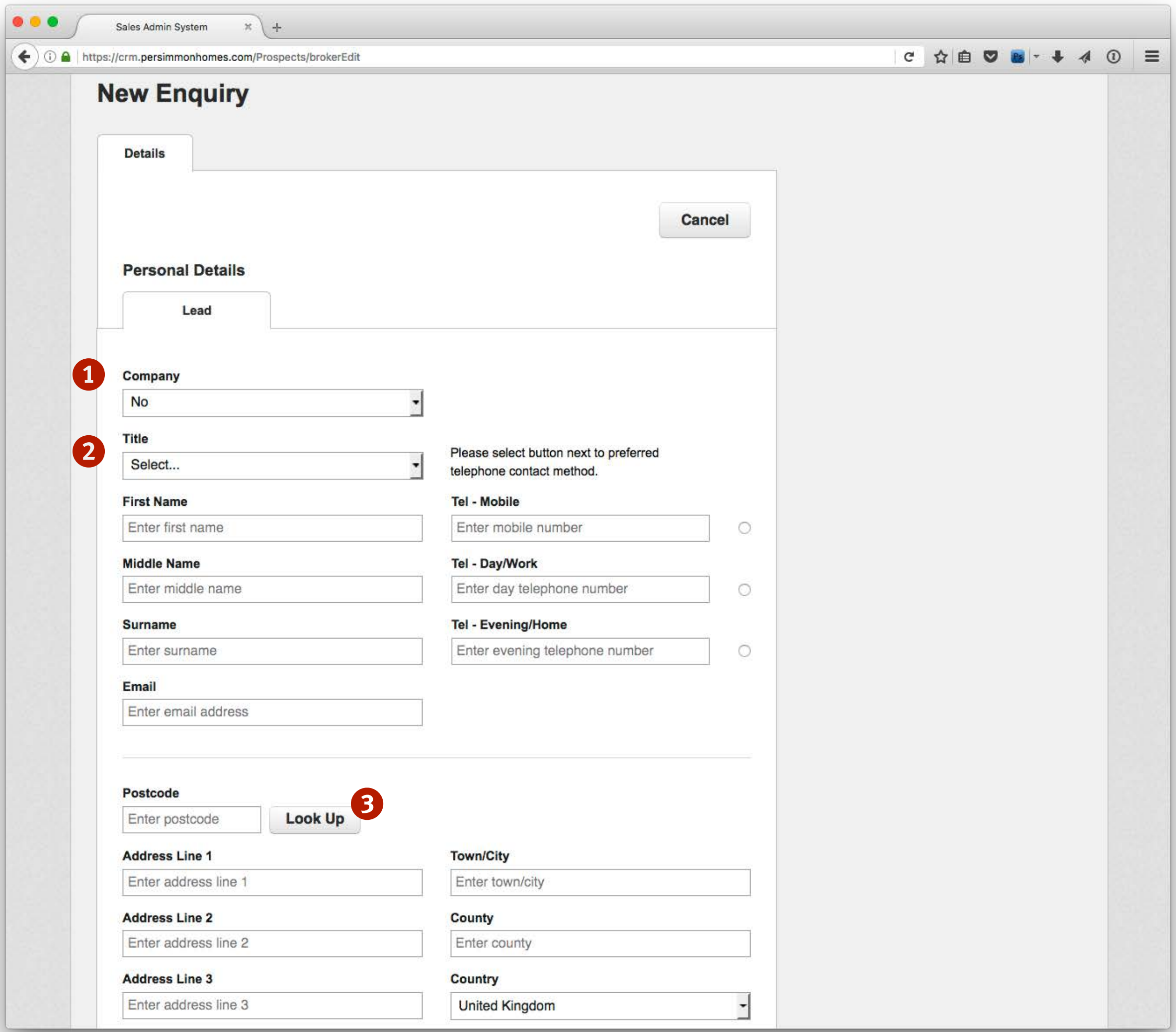
❶ Before adding a new Prospect ensure they do not already exist in the system, to avoid creating duplicates.

❷ Fill-in as many details as you can and click the ‘Search’ button to return results.

❸ Click the ‘View’ link to edit existing Prospect’s details.

❹ If the details return no results, the prospect does not exist in the system and a new enquiry can be added.

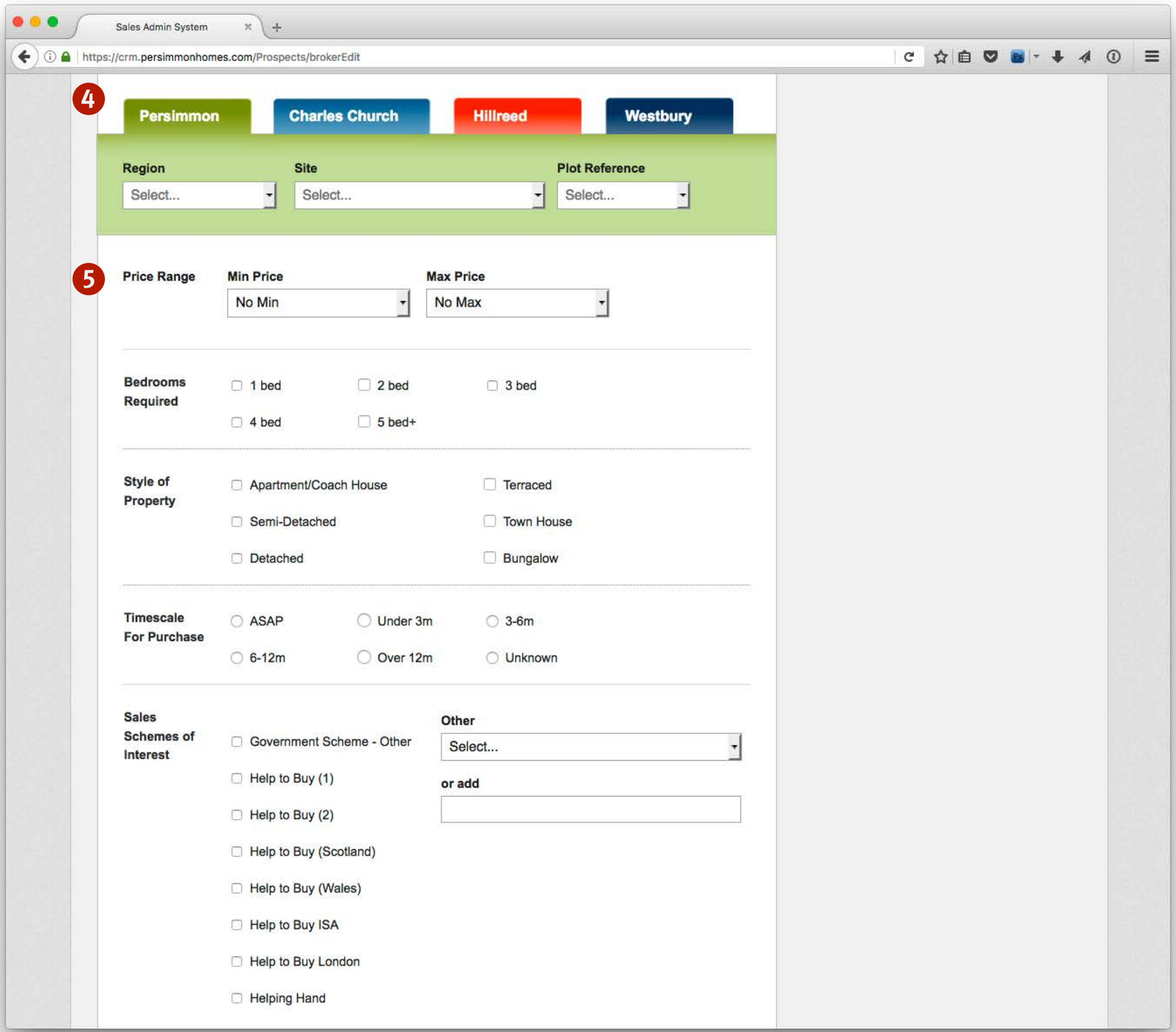
Prospects - Add/Edit



Once in a Prospect record you can add/edit various details.

1. Specify whether the enquiry is from a person or on behalf of a company.
2. Add/edit name and contact details.
3. Use the postcode lookup tool to add/edit address details.

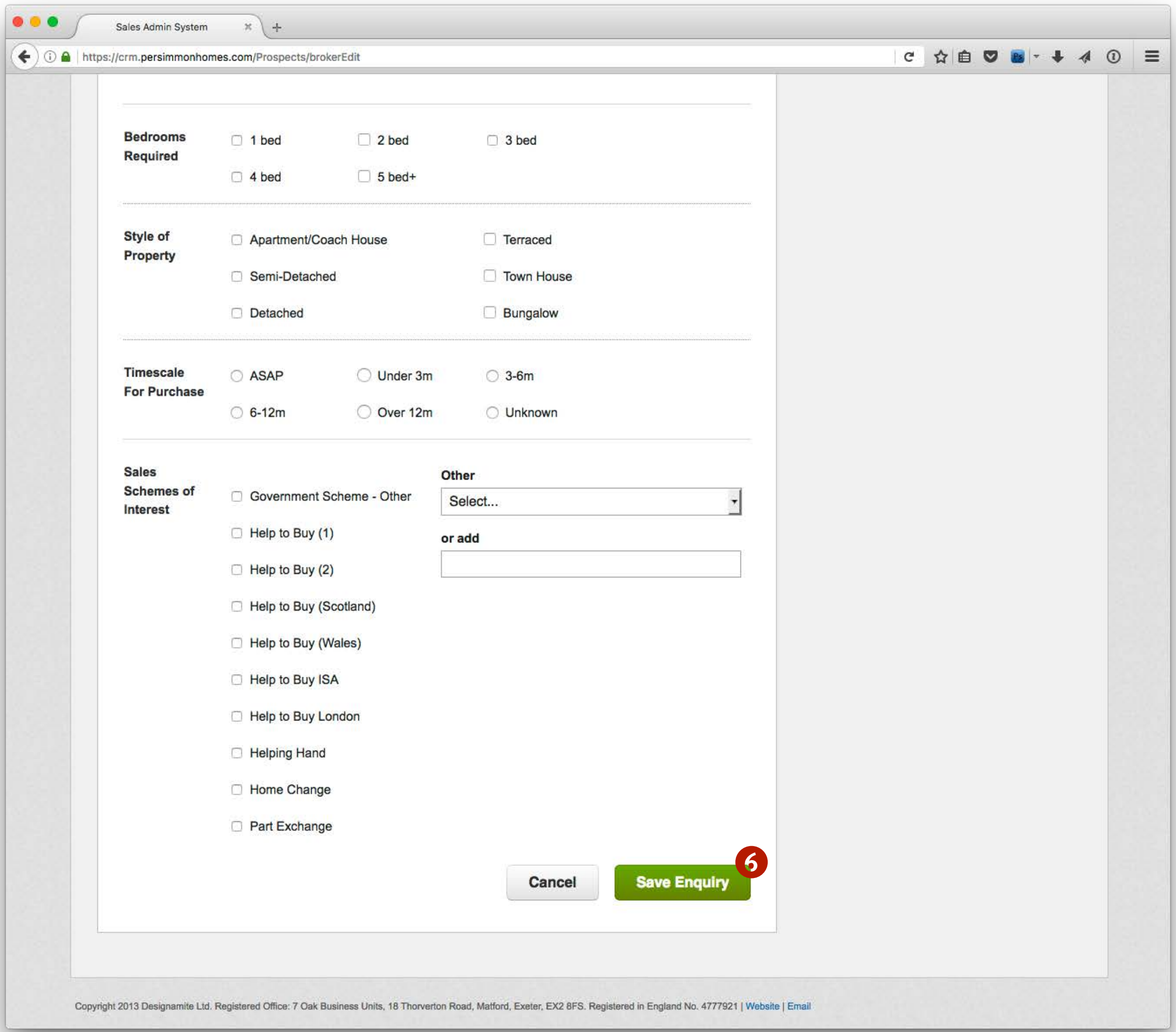
Prospects - Add/Edit (continued)



4 Specify region / development / plot(s) of interest.

5 Add/edit purchasing preferences.

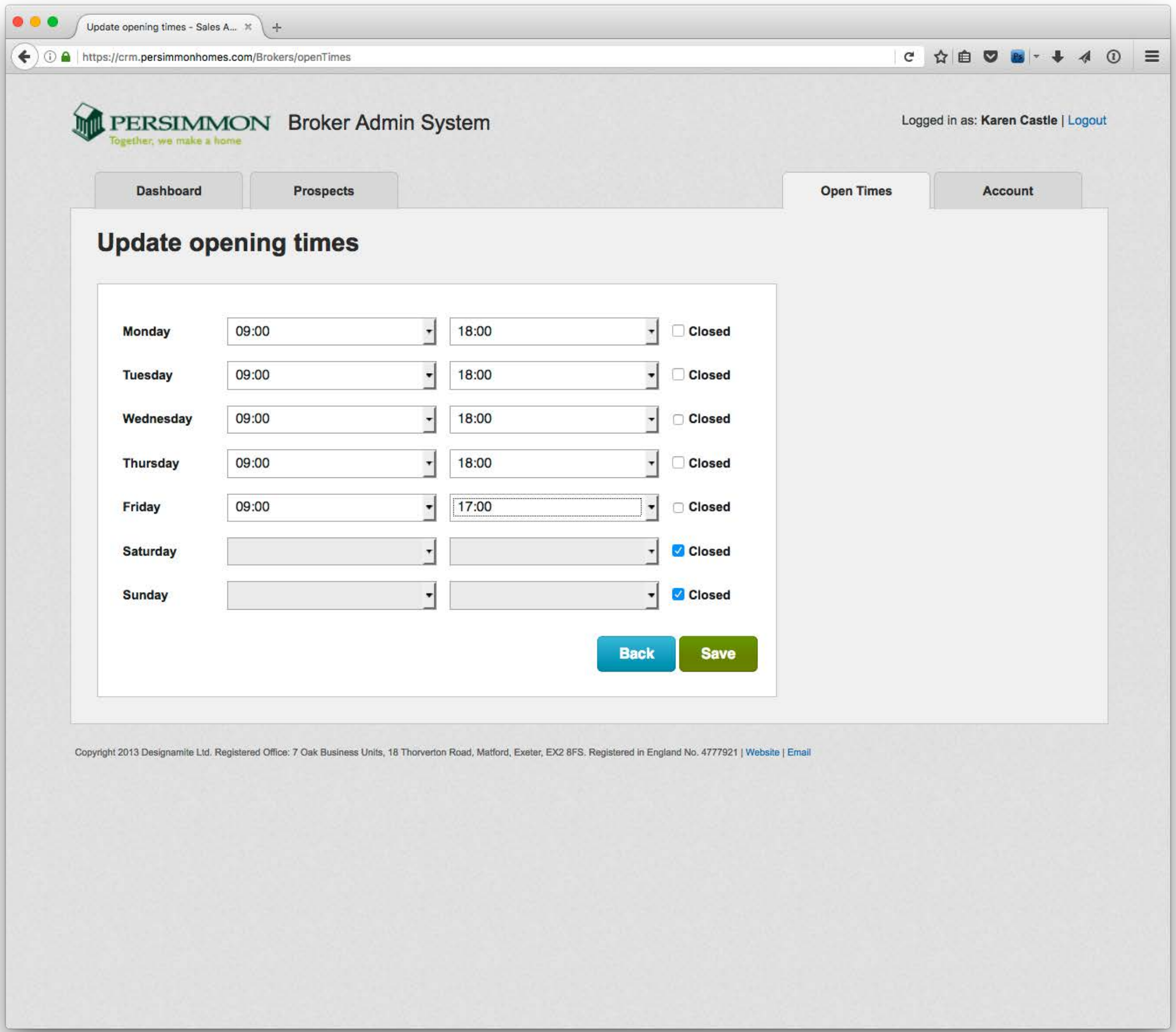
Prospects - Add/Edit (continued)



6 Confirm information with Prospect and save enquiry.

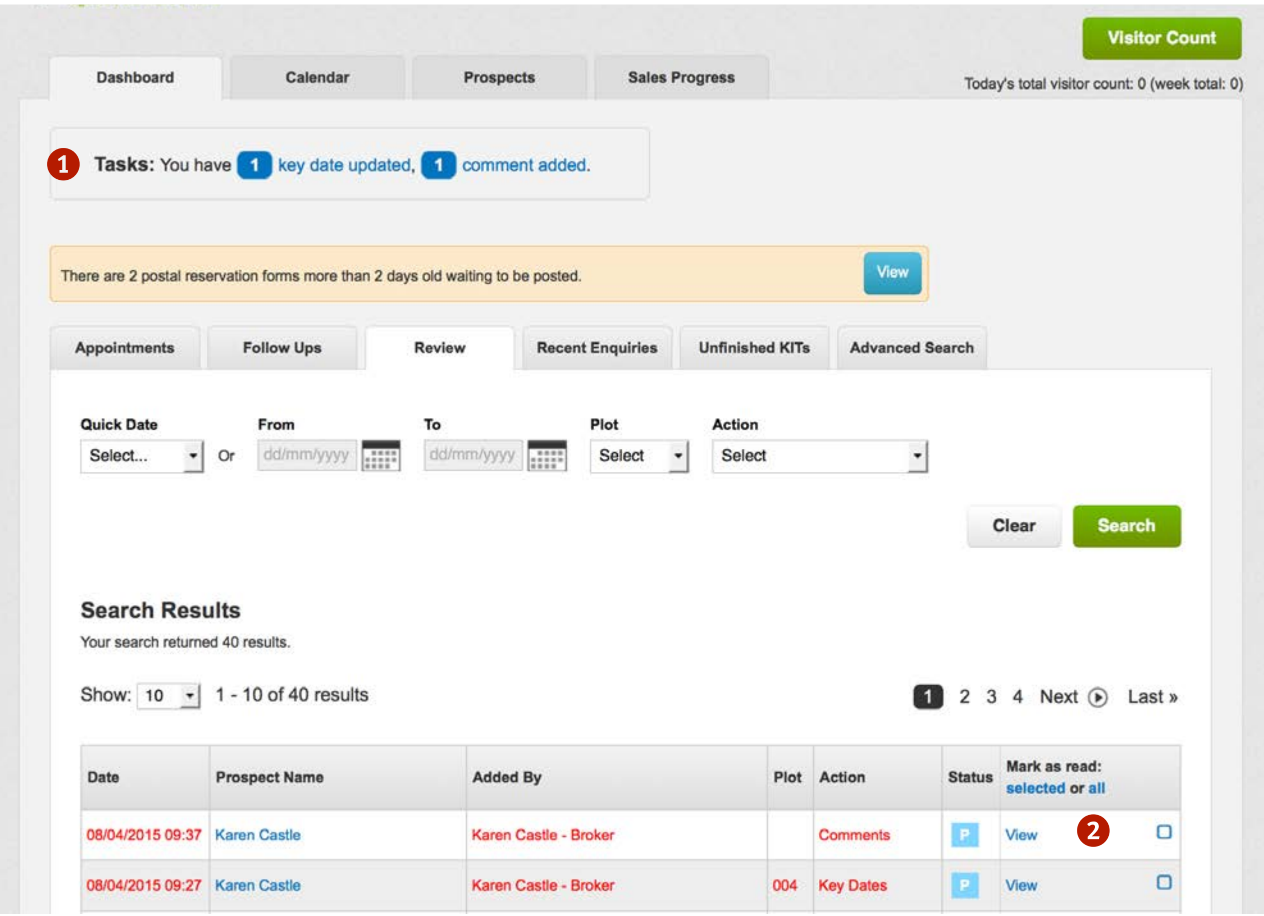
This will then add an alert to the relevant ‘Site’ dashboard, notifying the Sales Advisor that an incomplete prospect has been added to the system. They can then review the entry and add the outstanding information.

Dashboard - Open Times



1. The Open Times tab is where you manage your firm's business hours.
2. Specify opening times by using the drop-down menus provided.
3. Specify opening days by using the 'Closed' tick boxes.
4. Confirm opening times by clicking 'Save'.

Sales Advisor - Dashboard (for reference only)

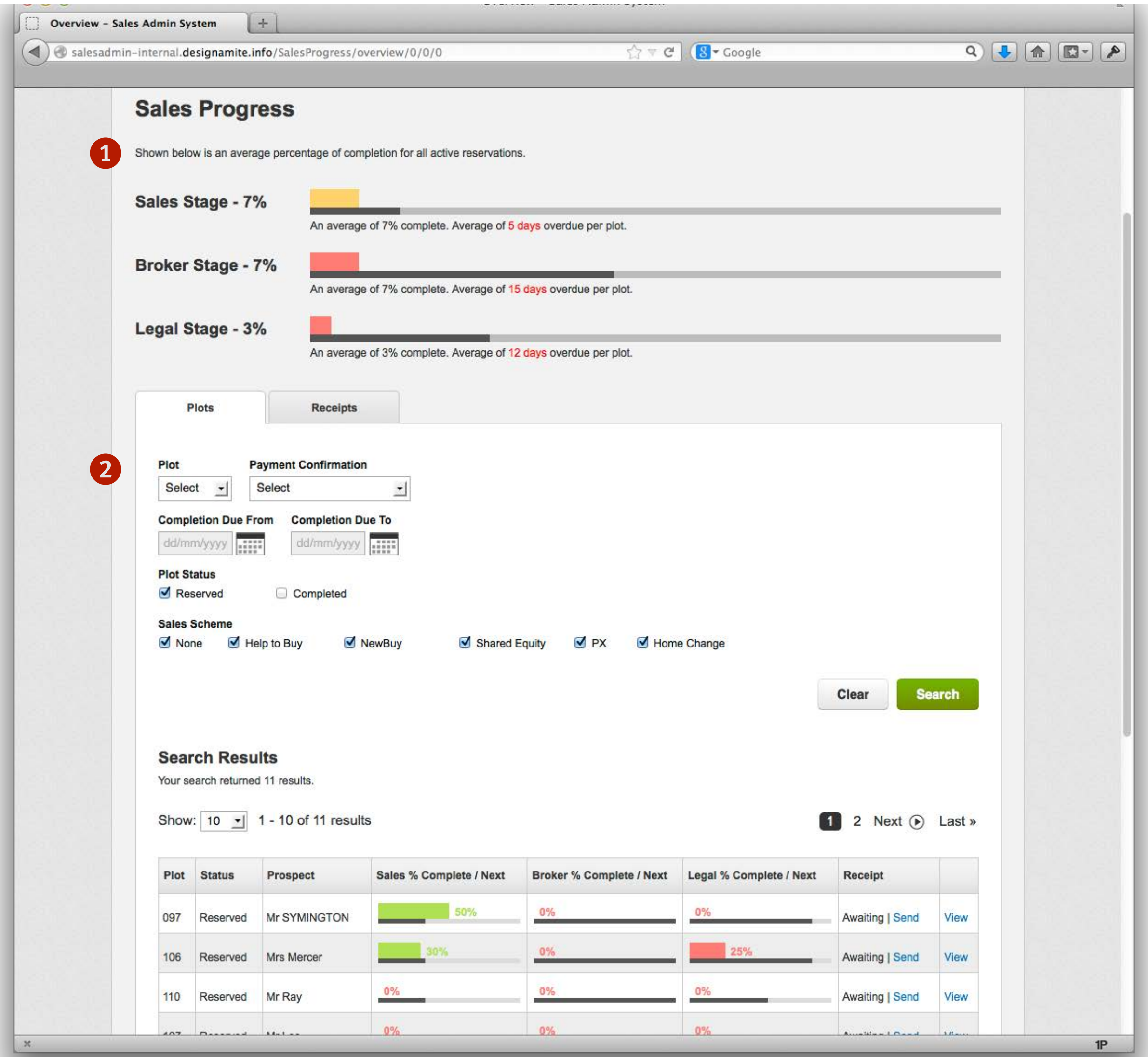


Sales Advisors are notified of any updates to a reservation made by a Broker.

1. The Task bar identifies which part of the Reservation has been updated (Key Date or Comment added, Enquiry, Appointment or Reservation removal).

2. The Sales Advisor clicks 'View' to see update(s).

Sales Advisor - Sales Progress Dashboard (for reference only)



Sales Advisors have a traffic light system to instantly see the status of each reservation.

1. Performance Overview - Linked to your Key Dates - the dark grey bar is where the Broker status should be (please note this is an average across all reservations for that site, not necessarily yours).

2. Plot specific - Sales Advisors can quickly identify issues. The dark grey bar is where you should be on any given plot, and the coloured % above is where you are. Green on target, Orange 1-7 days overdue, Red 7+ days overdue.