



SALESFORCE AE / SE PLAYBOOK

HOME BUILDERS

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A Quick Overview: Understanding This Industry

Single-family home builders operate a tightly coupled lifecycle from land acquisition to post-close warranty. Unlike many construction-adjacent businesses where demand is influenced through intermediaries, builders sell largely direct-to-consumer and must align sales commitments, design selections, construction execution, and homeowner experience.

What drives performance

- Conversion and speed-to-lead: response time, tour scheduling, and follow-up discipline.
- Inventory velocity: spec inventory aging, community absorption, and time-to-close.
- Margin protection: options and upgrades, pricing governance, change-order control.
- Cycle time and predictability: milestone orchestration, trade availability, inspection readiness.
- Warranty cost containment: recurring issues by plan/trade, SLA adherence, proactive communication.

Common operating model variants

- Production (community) builders: high volume, standardized plans, strong demand for inventory and pricing governance.
- Spec-at-scale / infill builders: repeatable spec process on single lots, speed and capital efficiency are critical.
- Semi-custom and custom builders: higher-touch design, more approvals and change orders, heavier customer communication load.

Overarching Market Themes

Major U.S. market trends affecting single-family home builders

- Affordability and interest-rate pressure: elevated mortgage and construction-loan rates continue to squeeze demand and builder confidence.
- Locked-in homeowners: many move-up buyers are anchored by low-rate mortgages from the COVID years, reducing resale supply and transactions.
- Cautious builder sentiment: builders are pulling back starts or delaying projects given uncertain outlook and rising cost bases.
- Material and labor cost inflation: supply constraints, tariffs, and wage pressure increase per-unit build costs.
- Moderate inventory growth: inventories remain low overall but are rising in many markets, increasing competition.
- Demand shifts toward value-add features and sustainability: energy efficiency, smart-home technology, and amenity-rich spaces are stronger drivers of choice.
- Geographic and demographic migration: sustained demand in smaller metros, suburbs, and Sun-Belt markets as remote/hybrid patterns persist.

Idea to test in discovery: Your homes are different - how are you engaging buyers with that message at each touchpoint?

Sales and marketing themes builders deploy to counter headwinds

- Value-driven messaging: shift from features to outcomes (monthly savings, turnkey move-in, warranty confidence).
- Targeted segmentation and personalization: tailor messaging and offers to buyer needs (first-time, move-up, women buyers, etc.).
- Digital-first and omnichannel engagement: stronger web, SEO, social, video, and virtual tools to meet online-first research behavior.
- Community and experience over product alone: emphasize lifestyle and in-person experience (model homes, visualization, tours).
- Lead nurture and sales process refinement: longer cycles require consistent follow-up and faster response to quality leads.

Key tactics you'll hear on discovery calls

- SEO and content marketing: neighborhood guides and education content ("new construction vs resale", "what to expect building").
- Video walkthroughs, virtual tours, and rich visuals to help buyers imagine the finished home/community.
- Paid digital advertising and geo-targeting (ZIP, interest, recent moves).
- Referral and reputation programs: testimonials, reviews, and trust signals to reduce buyer hesitation.
- Speed-to-lead systems: outreach within minutes to capture peak intent.

- Offline and traditional methods in tandem: signage, direct mail, events, sponsorships for local presence.
- Segmented messaging for specific buyer groups: functionality, storage, flexible spaces, and day-to-day usability.

Key Personas to Engage

Division President / VP of Sales

- Owns revenue, absorption rate, and sales execution at the community/division level.
- Wants visibility into traffic, conversion, sales pace, cancellations, and spec inventory aging.
- Cares about adoption: making the system easy for field sales to use is critical.

VP of Marketing / Director of Digital

- Owns lead generation, brand, and marketing ROI by community/region.
- Wants reliable attribution, segmentation, and consistent handoff to sales.
- Often driving omnichannel engagement: web, social, video, virtual tours, events.

VP/Director of Construction

- Owns cycle time, schedule adherence, inspection readiness, and trade partner performance.
- Wants predictable milestone orchestration and early warning on delays and exceptions.

VP of Customer Experience / Warranty

- Owns post-close experience, warranty SLAs, and cost-to-serve per home.
- Wants fast triage, better trade dispatch, homeowner communication, and trend insights to reduce repeat repairs.

Land / Development Leadership

- Owns land pipeline, entitlements, lot inventory, and release timing.
- Wants forecasting and governance from pipeline to community launch.

CIO / IT / Systems

- Concerned about security, integration burden, and long-term maintainability.
- Will ask: what connects to construction management, accounting/ERP, and marketing platforms?

Account Targeting

Home builders vary significantly by operating model and scale. The best targets align to clear pain around lead conversion, inventory velocity, buyer experience, warranty cost, and integration across construction/accounting systems.

Ideal customer profile signals

- Multiple active communities or significant spec inventory; need a single view of lots, availability, and sales pace.
- High marketing spend with unclear attribution; desire to prove ROI by community and improve lead quality.
- Inconsistent follow-up or long lead response times; management wants measurable speed-to-lead and coaching levers.
- Cycle time variance and frequent schedule exceptions; desire for milestone visibility and proactive alerts.
- Rising warranty costs or recurring issues; desire for trend tracking and trade performance scorecards.
- Multiple systems and spreadsheets; desire to standardize processes across divisions/regions.

Segmentation to consider

- Production/community builders (regional or national).
- Spec-at-scale / infill builders (high repeatability, capital efficiency).
- Semi-custom/custom builders (approvals and change orders are the main pain).
- Build-to-rent or attached product (process similar but different buyer/tenant experience).

SIC Targeting within Org62

- Pull your lists based on the following SIC codes: SIC prefix "15"; Target SIC codes 1521, 5122, 5131

Make a Strong Pitch: Messaging, with ROI Examples

Messaging themes that resonate

- Convert more traffic into contracts with faster response and consistent follow-up.
- Increase community absorption rate with real-time visibility into funnel and inventory.
- Protect margin by governing incentives, options, and change orders with approvals and auditability.
- Shorten cycle time and reduce delays with milestone orchestration and proactive exception management.
- Reduce warranty cost per home with better triage, trade dispatch, and recurring-issue insights.
- Unify the buyer journey from first click to post-close service in one platform.

ROI examples to quantify (use in discovery)

- Speed-to-lead: reducing first-response time can materially improve appointment set rate and conversion.
- Conversion lift: small improvements in traffic-to-contract translate to meaningful revenue per community.
- Cycle time reduction: shaving days off the build cycle improves turns and reduces carrying costs.
- Warranty cost reduction: fewer repeat trips and better root-cause visibility lower cost per home and improve NPS.
- Marketing efficiency: better attribution reduces wasted spend and focuses investment on high-performing channels.

Discovery Questions to Ask

Market and operating model

- Are you primarily production/community, spec-at-scale/infill, semi-custom, or custom?
- How do you measure community absorption and what are your targets this year?
- What are the top constraints right now: demand, labor/trades, permitting, cost, or capital?

Sales execution

- Describe the structure of your sales and marketing team – responsibilities, head count, and roles. Do you have field sales / territory managers, as well as model home agents, inside sales, etc?
- How do leads enter the business (web, social or SEO/SEM leads, walk-ins, scheduled tours of a model, portals, realtors, referrals)?
- What is your current speed-to-lead, and how consistently do reps follow up?
- How do you track tours and appointments? No-shows? Conversions?
- Where do deals stall most often (qualification, financing, lot selection, incentives, selections)?
- How do you track cancellations and their root causes?

Inventory and pricing

- How do you manage lot availability, releases, and spec inventory aging?
- How are base pricing, lot premiums, incentives, and option pricing governed and approved?
- How do you prevent mismatches between what was sold and what gets built?

Design and change orders

- How do you run selections today? What systems are involved?
- How are change orders initiated, priced, approved, and communicated to the field?
- Where do errors happen most often (pricing, feasibility, communication, timing)?

Construction operations and trade coordination

- What construction management platform do you use (BuildPro, Hyphen, Buildertrend, Procore, other)?
- What are your biggest causes of schedule variance and delays?
- How do you coordinate trades and inspections, and how do you handle exceptions?

Warranty and customer care

- What is your warranty cost per home and what are the most common issues?
- How do homeowners submit requests and how are they routed to trades?
- What are your SLAs and how consistently are they met?
- Do you track recurring issues by plan, elevation, trade, or community?

Technology and integration

- What are the core systems in your stack (CRM, construction mgmt, accounting/ERP, selections, marketing)?
- Where is the most painful handoff today (marketing to sales, sales to construction, construction to warranty)?
- What reporting takes the most manual effort (spreadsheets) to produce each week?

Common Processes to Streamline

Major functional areas

- Sales and marketing: lead capture, nurture, tour scheduling, follow-up, conversion.
- Design: selections, pricing, change orders, approvals, buyer communication.
- Construction operations: milestone orchestration, exceptions, trade coordination, inspections.
- Warranty and customer care: intake, triage, dispatch, homeowner communication, trend analysis.

Typical end-to-end stages

Sales -> Design -> Construction -> Warranty -> Customer Care

High-value automations

- Lead capture and assignment by community/geography/availability; automated first-response tasks and alerts.
- Appointment and tour workflows with reminders and no-show follow-up.
- Lot/plan/option pricing governance with approvals for incentives and exceptions.
- Contract and change order document generation with e-signature integration.
- Milestone updates and exception alerts (delays, inspection failures, missing prerequisites).
- Warranty case routing by category/severity/home age; trade partner SLAs and homeowner notifications.
- Executive dashboards: funnel, sales pace, inventory aging, cycle time, warranty cost trends.

Typical Tech Stacks in the Industry

Industry CRMs you may encounter

- Lasso CRM (home-builder specific lead and conversion workflows).
- Hyphen CRM (often paired with Hyphen operations/ERP modules).

Construction management and operations platforms

- BuildPro (Hyphen Solutions) - scheduling, purchasing, trade coordination.
- Hyphen suite (including ERP modules such as BRIX/HomeFront).
- Buildertrend - construction and client communication for smaller/mid builders.
- Procore - construction management, often for broader contractor ecosystems.

Accounting and ERP

- QuickBooks and Sage (common in mid-market).
- Sage Intacct, NetSuite, and other ERPs (growing in larger builders).

Salesforce Products, by Likely Fit

Sales Cloud

Unsurprisingly, Sales Cloud needs will be present for essentially every builder.

- Lead-to-contract process, community pipeline, forecasting, and sales management.
- Custom objects for Community/Project, Lot/Homesite, Plan/Model, Options (as needed).

Salesforce Maps

- Field sales and community coverage; route planning for model home visits and competitive checks.
- Territory alignment for regional/division sales teams.

Account Engagement (Pardot) / Marketing Cloud

- Lead nurture for longer cycles; segmentation by community, price band, and buyer preferences.
- Attribution and campaign performance by community and channel.

Experience Cloud

- Buyer portal: milestones, documents, selections checkpoints, FAQs.
- Realtor portal: inventory, registration, co-marketing, commission visibility (where applicable).
- Trade partner portal: work orders, schedules, documentation, communication.

Service Cloud

- Warranty intake, triage, SLAs, and knowledge.
- Omni-channel service (phone, web, email) for larger builders; customer communication templates.

RCA

- If building proposals, contracts, and change orders from within Salesforce, vs. Hyphen or other system, RCA will almost certainly be required to manage the complexity of the configuration for a home.

Field Service

- Dispatch and scheduling for warranty technicians (where the builder runs internal service crews).

Tableau

- Community dashboards: sales pace, conversion, inventory aging, cycle time variance.
- Warranty analytics: recurring issues by plan/trade/community; cost trends and root cause indicators.

MuleSoft / Integration

- Integrations to construction management, selections, accounting/ERP, and syndication sources. Beware - some of those industry platforms with their own CRM (Hyphen!) deliberately make integration tough by not offering up to the API the data we'd actually need.
- Event-driven updates for milestones, contracts, and warranty status.