



✓ **Lykke Enterprises & Shelter Home Systems**

Sales Checklist

1. 📄 Initial Client Contact

- Collect client contact details
 - Determine client needs (size, style, budget, timeline)
 - Educate client on factory-built vs. RTM homes
 - Verify desired location
 - Check zoning compatibility
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2. 📍 Site & Land Evaluation

- Confirm if client owns land or lot
 - Assist with land acquisition if needed
 - Conduct site visit or request site survey
 - Check for utility access (hydro, water, sewer/septic)
 - Confirm zoning, setbacks & municipal bylaws
 - Identify need for grading, clearing, or excavation
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3. 🏠 Home Selection & Customization

- Present available modular home models
 - Discuss customization options (floor plan, finishes, upgrades)
 - Confirm CSA A277 compliance (provincial building code)
 - Finalize specifications and options
 - Provide CAD renderings or floor plans
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4. 💰 Pricing & Financing

- Provide formal quote (base + upgrades + delivery + site work)
 - Discuss deposit and payment schedule & applicable taxes.
 - Assist with financing or mortgage approval
 - Clarify warranty coverage (manufacturer & dealer)
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5. **Contracts & Documentation**

- Draft and sign purchase agreement
 - Include site prep, delivery, and installation terms
 - Provide CSA certification documentation
 - Confirm insurance requirements (builder's risk, liability)
 - Initiate municipal building permit application
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6. **Site Preparation & Delivery**

- Hire/coordinate excavation, foundation, utility connections
 - Prepare foundation (crawl space, slab, or basement)
 - Schedule and confirm delivery date
 - Coordinate crane/lift if required
 - Follow up on road permits/escorts with freight company
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7. **Installation & Finishing**

- Oversee placement and joining of modules (if sectional)
 - Connect all utilities (hydro, plumbing, HVAC)
 - Complete interior & exterior finishing
 - Conduct final municipal inspection and obtain occupancy permit
 - Perform quality assurance walkthrough
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8. **Client Handover**

- Conduct final walkthrough with client
 - Provide keys and access codes
 - Deliver home manual, CSA certificates & warranties
 - Educate client on maintenance requirements
 - Collect final payment
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9. 📞 After-Sales Support

- Follow-up call within 1–2 weeks of handover
 - Schedule service for any deficiencies
 - Provide emergency contact information
 - Request testimonial or referral
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10. 📁 Record Keeping

- Archive contracts, permits, and inspection reports
- Log warranty start dates and service records
- Maintain full client communication history

Notes:

Lykke Enterprises Inc.

We Deliver Affordable Factory-Built Quality Homes.

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