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Efficient rigs in manufactured digs; Consumer and dealer research on energy efficiency in manufactured homes

Qualitative Research Report
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BACKGROUND, OBJECTIVES + RESEARCH DESIGN



BACKGROUND

- € The initiative is designed to target manufacturers to build to a higher energy efficiency (EE) performance standard than is (voluntarily) in place today.
- € The primary focus of the initiative is upstream market actors – **manufacturers and dealers**. As part of the effort to encourage manufacturers to supply these higher performing homes, **NEEA will** provide **utility partners** the information and insights to effectively communicate the value of these homes to their home buying customers.



OBJECTIVES

Business Objective

The business objective of this initiative is to advance the voluntary energy efficiency standard to which NW manufacturers homes must be built. Also, to provide manufacturers and retailers actionable information to change how home buyers set value for manufactured homes and to drive purchases of homes that have more expensive energy efficiency configurations – i.e. transform the market for energy efficient manufactured homes.

Research Objectives

Generate insights to drive demand for manufactured homes, by understanding:

- Path to Purchase
- Key Influencers of Purchase
- Hierarchy of Needs
- How to position the non-energy benefits of manufactured homes with the increased EE configurations that are most likely to compel purchase, including:
 - The value of these benefits relative to one another
 - The believability of these benefits
 - The best way to contextualize the benefits
 - The most easily understood consumer language to articulate the above



RESEARCH DESIGN {overview}

1} Embark

{phase

- Kick-off meeting with NEEA + Arrow G to begin the learning journey

2} Explore

{phase

- A combination of in-home and manufacturer/dealer interviews to create our base of understanding

3} Establish

{phase

- A strategic workshop to review findings, create mini-personas for both retailers and consumers, and identify the primary target for marketing communications.



RESPONDENTS

Consumers

Sampling criteria are designed to provide a qualitatively determined, representative set of MH buyers and retailers. Participants (n = 10) were recruited in OR(2), ID,(3) WA(2) and MT(3) and according to the following specifications:

- None to work in related energy or research/marketing fields
- Income commensurate with the market
- Mix of urban and rural
- Mix of female/male head of household
- All share equally or are primary decision maker for home buying
- Approximately half purchased a manufactured home in the past 12 months and half plan to purchase (intenders) in the next 12 months

Retailers

Participants (n = 6) were recruited according to the following specifications:

- Open to location within the US. At least two within the OR(1), ID,(1) WA(2), or MT(2) areas
- Mix of marketing, sales, training, or owners of manufactured homes businesses
- Strive for mix of male/female
- All have access to and experience with the consumer's purchase process of a manufactured home





EXECUTIVE SUMMARY



OVERALL SNAPSHOT

1

The MH Purchase is perceived to be more complicated than buying a traditional home. It's not as easy as just buying the home.

2

MH and MH communities have a negative connotation that must be overcome.

3

The Path to Purchase for MH is intuitive and the internet plays a key role.

4

The most appealing aspects of energy efficiency are COMFORT + QUALITY.



1

THE MH PURCHASE IS PERCEIVED TO BE MORE COMPLICATED THAN BUYING A TRADITIONAL HOME.

Similar to other types of homes, shoppers prioritize features such as open floor plan, big kitchen, storage and quality construction. However, purchasing a MH is seen as being more complicated than buying a traditional home. *It's not as easy as just buying the home.* There are a lot of details that are somewhat different than the standard home buying process:

- € Finding and purchasing the land needed to place the home is a significant hurdle for many shoppers.
- € Preparing the land for the home is also more involved than traditional home buying, as laws and requirements are different in different areas (such as requiring a slab for the foundation).
- € Financing for MH is a particularly complex (and frustrating) process for shoppers trying to buy a home.



2 MH AND MH COMMUNITIES HAVE A NEGATIVE CONNOTATION THAT MUST BE OVERCOME

MH shoppers often have to overcome a negative connotation associated with manufactured homes. This presents a significant hurdle for some shoppers as well as manufacturers/dealers.

- € Shoppers sometimes have an outdated view of what a MH home is, associating them more with 'trailers' or 'mobile homes'. This view impacts their perception of the quality of manufactured homes overall.
 - € "There is a lot of misinformation out there about the quality of MH. A lot of shoppers can't get past old definitions of a 'trailer'. (Retailer)
 - € "When I decided to go with a MH, it took me a while to come around to it. I'd only ever lived in traditionally built homes so I took a lot of convincing. But, they (MH) have come a long way and give traditionally build homes a run for their money. The quality has REALLY improved." (Consumer)

Additionally, the concept of a 'trailer park' compounds this negative connotation relative to MH communities. For this and other reasons, few buyers are putting new MH in communities.

- € Existing communities are geared toward pre-owned MH and single-wide homes, not today's larger MH. Because of their size, communities simply cannot accommodate the size of these homes.
- € Communities for new MH are hard to find.
- € Today's buyers often don't want to live that closely to their neighbors.
- € Retirement parks are an exception. They offer a lot of amenities for older people – gated entry, storage facility, club house and pool, winter care/maintenance of the homes making them worry free for snow birds.



3

THE PATH TO PURCHASE FOR MH IS INTUITIVE AND THE INTERNET PLAYS A KEY ROLE.

Among the consumers we interviewed, many MH shoppers appear to use the internet throughout their path to purchase but especially in the very earliest stages.

- € 'New to MH' shoppers still need some convincing regarding a MH so they tend to look for general and unbiased information regarding how MH are constructed, how they compare to stick built homes and other structural information.
- € 'Experienced MH' shoppers tend to look for retailers through google, Craigslist and other broad search engines that will help them find retailers in their specific area.
- € Potential buyers are unclear of the differences among retailers—therefore they actively seek pricing to quickly deselect retailers that are too expensive.

PATH TO PURCHASE



4 THE MOST APPEALING ASPECTS OF ENERGY EFFICIENCY ARE COMFORT + QUALITY.

Consumers equate EE homes to being more comfortable and higher quality. This includes both the physical and emotional/mental aspects of comfort and quality. (See slide 22 for more details)

- € The EE features that are top of mind for consumers are: appliances, windows, flooring, insulation and roofing.
- € There is a wide range of price points within the MH category; dealers know that buyers focused on lower price points are less aware of/interested in/willing to pay more for EE benefits. Identifying dealers willing to include EE MH in their sales assortments is key for NEEA.
 - € Not all retailers are targeting the full range of shoppers. Some feel their shoppers “only care about price.”
 - € There is a very willing market of shoppers with bigger budgets and an interest in paying more for efficiency which should be a primary focus for NEEA—and, perhaps an opportunity to expand the market of people who might consider a MH. Retailers say that selling EE benefits to these shoppers is not a hard sell.



“Retailers say they receive “fewer complaints” with Energy Efficient/Energy STAR homes.”





KEY RECOMMENDATIONS





TARGET RECOMMENDATIONS

- € The primary target for the MH market at this time is retirees who desire comfort and quality in their home and have the financial means to purchase EE options.
- € Partner with key retailers who are located in areas with strong retirement populations who also desire a premium offering within their assortment which EE homes could provide.
- € Deprioritize retailers who feel their shoppers are overly price sensitive or don't have strong retirement populations.
- € Seek ways to incentivize dealer partners to sell EE options, in addition to incentives for consumers.





COMMUNICATION RECOMMENDATIONS

- € Communication to consumers should focus on **BENEFITS** rather than features.
 - € Dimensionalize the features an EE home has and communicate them in a consumer-friendly way (e.g., What is the **benefit** of a specific R-rating on insulation versus just telling them what the R-rating is).
- € Build communication around **QUALITY** and **COMFORT** benefits.
 - € EE features communicate **QUALITY** because both consumers and retailers recognize that EE materials have a more premium construction and price tag and, therefore, they expect a premium product. Quality also relates to **longevity** as they expect better construction will last longer.
 - € EE features also communicate **COMFORT** because both consumers and retailers equate better, quality products with a higher comfort level living in the home. For example, a home that is better insulated is ultimately more comfortable because it holds heat/cold temperatures better than a home that does not have higher-end insulation.





COMMUNICATION RECOMMENDATIONS

- € Consider communication that highlights the “new MH”—one that is very different than the “70’s trailer” that is assumed by consumers.
- € Prioritize and optimize online touchpoints as it is a key player in the P2P. Assist dealers in providing the right information via their websites, social media and paid online ads.
- € Provide educational materials dealers can use during the retailer visit and shoppers can take home. This can be related to MH, EE options as well as subsequent steps in the P2P. Basic information and recommendations regarding financing and location can be very helpful to shoppers as well.



“It was really frustrating looking at the dealer websites. They show a beautiful pictures and floor plans but give no pricing information. I fell in love with something I couldn’t afford. But, I didn’t know that until I went to the retailer. It made going to the retailer and finding out the price really disappointing.”





CONSUMER FINDINGS



TARGET CONSUMER: FRED + PAM



AGE: 58 (Fred) and 55 (Pam)

OCCUPATION: Retired, Grandma + Grandpa

LOCATION: Willamette Valley, OR

ADJECTIVES: playful, active, independent, thoughtful, methodical, aware

MOTIVATIONS

- Downsizing
- Flexibility of location
- Space for the whole family
- Supports a fun lifestyle
- Leaving a legacy for the future generations

GOALS

- Buying smart to live large
- Reduce the outgoing cash but still enjoy life
- Customize the last home we will own to our liking

FRUSTRATIONS

- Potential image issues
- Fixed income?

We're selling our house...taking that equity and buying a home with less maintenance, more outdoor space and completely customized to our taste.

We want a home where everyone in our family comes to be together, where we can live and play and be happy in our last home.





MH BUYERS NEEDS ARE UNIQUE

- € Characteristics of the MH shopper/buyer are unique. Their lives are complicated and less stable. They can be cautious, suspicious and wary. They often have complicated personal lives, instability and unstable financial circumstances. This is especially true of shoppers at the lower end of the price range.
- € Some examples that we heard in this research:
 - € Multi-generational, single head of household and blended family dynamics which have unique needs
 - € Difficulty qualifying for financing due to past credit problems
 - € English as a second language makes comprehension of process and terminology more difficult





MH BUYERS ARE CONFRONTED WITH A COMPLICATED SET OF DECISIONS AND ARE PRESSED TO MAKE DECISIONS QUICKLY

- € Consumers who have no experience with MH are completely lost and often do not know where to even begin understanding the basics of MH.
 - € When these consumers discover the new MH, they are pleasantly surprised since their perception is the “trailer of the 70s/80s”.
- € Due to some of the dynamics of their complex lives, speed is a top priority for MH shoppers and can be a selling point for MH vs. Stick Built homes
 - € 1 week: Getting an apartment
 - € 1 – 2 weeks: The typical process for a pre-owned MH is very quick, especially if it is on the lot and ready to ship.
 - € 2 – 3 months: The typical process for a new MH to build – much faster than a stick-built home.
 - € 6+ months: The typical process for a new stick-built home.

“Based on my situation, I needed to move somewhere fast. The MH wasn't the fastest – getting an apartment was - but I was sick of apartment living. So, I went with a new MH because it was done much sooner than a traditionally built home would have been. It was a great decision”





MH BUYERS WANT QUALITY AND COMFORT ON A BUDGET

MH buyers sometimes have smaller budgets for a variety of reasons therefore they want a comfortable, quality home that fits their budget. “What can I afford?” is the driving question when searching.

- € There is a perception that manufactured homes do not hold their value like other types of homes do. But consumers want quality—they want something that will be their “forever home”.
- € Shoppers define quality and comfort in a variety of ways:
 - € Physical comfort
 - € cool in the summer and warm in the winter
 - € Space for the whole family
 - € Easy to maintain as they age
 - € Customization to fit their lifestyle (especially if downsizing)
 - € Emotional/mental comfort:
 - € Flexible location
 - € Supports a fun lifestyle
 - € Quality materials and construction that stand the test of time
 - € Buying smart to live large
 - € Leaving a legacy for future generations





PATH TO PURCHASE





PATH TO PURCHASE



ONLINE



**RETAILER
VISIT**



FINANCING



**LOCATION/
PROPERTY**



DECISION



PURCHASE



THE PATH TO PURCHASE FOR MH IS INTUITIVE

» » » » » PATH TO PURCHASE » » » » »



ONLINE

Path to purchase often starts online with shoppers looking for basic information and to learn about MH in general.



RETAILER VISIT

Once shoppers feel they have exhausted their resources or are just ready to see some homes in real life, they will visit a retailer.



FINANCING



LOCATION/ PROPERTY

Then, financing and property decisions come into play. This is often where the process breaks down. If shoppers are able to overcome those hurdles they often complete the purchase.



DECISION

Once these hurdles are cleared, they will make a decision on which home they want and then make the purchase.



PURCHASE



“
Manufactured was 2/3 the price of stick built for pretty much the same structure. The quality of these homes these days is just as good! Being on a fixed income, it made no sense to do stick built.
”





ONLINE

RETAILER
VISIT

FINANCING

LOCATION/
PROPERTY

DECISION



PURCHASE

Path to purchase often **starts online** with information gathering.

- € Shoppers are looking at floor plans, finding retailers, understanding pricing and available options. They often visit a variety of websites including manufacturers, retailers and social media to gather information and opinions.
- € Social media, such as Facebook, allow consumers to see reviews and comments from other MH buyers. This is an important part of their early search for a MH.
- € Shoppers say that retailers that offer limited information or require contact information to get additional detail on their websites are 'shady'. Shoppers feel like they are being 'baited' to visit the retailer where they will get a high pressure pitch. This is unappealing. Websites that are up front with their information (especially pricing) are seen as the most reputable and appealing to visit.
- € Shoppers rarely get any messaging regarding Energy Efficiency options during the online research stage.

“

“It's hard b/c they don't tell you what they cost on their websites – not even a range or ‘starting at’ information. I don't want to fall in love with something I can't afford...it makes me feel like they are hiding that information and that's suspicious to me.”

”





ONLINE



**RETAILER
VISIT**



FINANCING



LOCATION/
PROPERTY



DECISION



PURCHASE

Overall, shoppers visit retailers when they are ready to see the homes in real life. At this stage, shoppers can become more serious. It can be an intimidating experience for shoppers but also a key time to build a relationship and get educated.

It will be important to focus on communicating **benefits** over features. Consider the following:

- € Glossary of important technical terminology (both EE and general) linked to visual depictions of the benefits each offers.
- € Additional information about the retailer's options related to upgraded materials throughout the home and the benefits of them.
- € Links to interactive videos that further educate shoppers on how the home is constructed and the options available to them in the design center.





ONLINE

**RETAILER
VISIT**

FINANCING

LOCATION/
PROPERTY

DECISION



PURCHASE

Energy Efficiency is not at the forefront of the sales process despite easy associations to features in the home that provide EE benefits.

- € EE features are not necessarily called out by sales staff as such, even though in some cases they are naturally part of the sales conversation (they are not linking these features to EE).
 - € For example, windows and insulation are a natural part of the sales conversation but retailers are not necessarily linking those to EE.
- € Appliances are often discussed as upgrade options (again, with little to no link to EE).
- € Some consumers see the EE options as “things we could do ourselves over time” – especially if they are trying to stay within a specific budget.



“

“Being off the grid is important to me...I look for options that will allow me to do that. I want to be self-sustaining, to know that if the electricity goes out, I can generate my own and live just fine.”

”





ONLINE

**RETAILER
VISIT**

FINANCING

LOCATION/
PROPERTY

DECISION



PURCHASE

SHOPPER POINT OFVIEW

- € Shoppers expect that a visit to the retailer will provide the opportunity to see the actual houses as well as the information needed to make decisions about purchase (layout options, pricing information and delivery).
 - € Delivery range of retailers becomes a consideration at this stage as many live in rural areas.
- € They are interested in a variety of information from technical to decorative. However, they are getting so much information during the retailer visit that they need it simplified.
 - € For example, retailers often demonstrate the quality of construction visually by showing actual 2x4's and insulation in a clear box. This information is easy for consumers to understand. However, the conversation and verbiage often jumps to R-ratings and other very technical terminology. Consumers need a bridge to get them from visual understanding to technical understanding.
- € Some consumers compare the process of purchasing a MH with that of a used car. From the sales staff being “like a used car salesman” to the “trade in” of a used MH, to the experience of purchasing.



“

“I felt judged the moment we pulled up to the retail center...he thought we weren't really serious and definitely didn't think we could afford to build new. At other places, we weren't even acknowledged.”

”





ONLINE



**RETAILER
VISIT**



FINANCING



LOCATION/
PROPERTY



DECISION



PURCHASE

RETAILER POINT OFVIEW

- € Retailers want to quickly understand what the shopper is prioritizing in their home (e.g., open floor plan) AND the budget they have set for themselves.
 - € For retailers who sell both used and new MH, knowing the budget makes it easy for them to direct the conversation towards the appropriate set of homes.
- € They are aware shoppers want to see the home as soon as possible, hence the numerous homes on site.
 - € Each retailer has a different approach to how they sell shoppers on their homes. Some prefer to lead with price, some with optional features and some with quality of their product.
- € They rarely talk about building materials unless they feel that the buyer is familiar with construction. They believe that the average consumer will not understand the difference between values and technical information.
- € According to retailers, MH shoppers have changed. They say the shoppers are much more knowledgeable coming into the process—thanks to the internet. Retailers recognize this may mean a change in how they sell their homes.





ONLINE

RETAILER
VISIT**FINANCING****LOCATION/
PROPERTY**

DECISION



PURCHASE

Once a shopper has visited the retailer and decided to move forward, the next step is to get financing for the purchase. Locating property often happens at the same time or just after financing is secured. This is a complicated time in the purchase process and often where the process breaks down. If shoppers are able to overcome those hurdles they often complete the purchase.

- € Financing is particularly frustrating as there are stringent regulations and guidelines from the bank for MH.
- € Preparation of the land and type of foundation/pad is a big consideration in the process and a source of uncertainty for shoppers. Retailers are limited in their ability to help in these areas therefore trusted outside resources such as realtors and contractors become valuable to completing the sale.



“We needed help finding a place to put the home. Our dealer wasn't able to do that because they aren't realtors. That issue threatened the whole deal. Thankfully we found a realtor to help us but it would have been nice if the dealer could have helped with that too.”





ONLINE



RETAILER
VISIT



FINANCING



LOCATION/
PROPERTY



DECISION



PURCHASE

Once financing is secured and location is determined, shoppers will make a decision and officially buy their home.

- € At this point, shoppers make final design/upgrade choices.
 - € This is a key time for retailers to influence buyers and 'sell' EE benefits.
- € This is a very exciting but also frustrating time for shoppers as they often have to wait weeks or months to move into their home.

“

“The process is kind of nerve wracking – so many things to do – we had to wait for them to build it at the factory which made us anxious. But you just have to be patient. Best thing is when you move in it’s all done!”

”





RETAILER FINDINGS





MH BUYERS ARE EVOLVING

- € The MH retail industry seems to be a more traditional, male-driven sales force. When entering their offices, there is typically a female receptionist but the rest of the teams tend to be male. However, retailers say women make the ultimate decision to purchase.
 - € They say men tend to ask about construction, like insulation, walls, etc. and women tend to ask about design options, like countertops and finishes. That means EE communication needs to speak to both 'sides' of this conversation.
- € Consumers in the industry have changed, according to retailers.
 - € They enter the sales centers more prepared and educated than ever before (thanks to the internet) which pushes the conversations to move more quickly.
 - € They are actively looking at competitors and so retailers feel they have to adjust to win the business. Retailers need to have a clear point of difference in the marketplace and be able to articulate it. EE is a good way to differentiate.
- € Most retailers believe they have a good idea of their target audience.
 - € Many offer MH (both new and pre-owned) to a wide range of potential buyers, hoping to sell to anyone interested.
 - € Some retailers specialize in the higher-end range—and EE tends to play a more significant role in their offer (in some cases, it is their point of difference).



“Shoppers want the same luxury as a ‘regular’ home – updated kitchen, custom work, etc. They come in with a trailer mentality but once they get into the home, they are impressed/wowed.”





EVOLVING THE MARKETING APPROACH

- € Retailers vary in the tools they use for marketing.
 - € Some are leveraging the power of social media, like Facebook—posting videos and actively engaging with their consumers.
 - € Most are acutely aware of the “word of mouth” that happens over the internet with the ease of consumer feedback and reviews.
 - € Retailers try to help people imagine themselves living in the MH by staging them and making them feel ‘at home’.



“

“The best way to sell to people is to show them how much space they can get for a much lower price. Then, you reassure them about the quality and make sure they know they can pick finishes to make it their style just like a stick built home.”

”





CUSTOMER SERVICE IS IMPORTANT

- € Retailers believe customer service is the number one thing potential buyers look for AND return to when searching again at a later time.
 - € Their values and beliefs on customer service vary widely. Most fancy themselves excellent sales people (though consumers say otherwise).
 - € Many mention “sleezy techniques” as off-putting for consumers—and something they strive not to be in the market. They want to ask questions without being too invasive and overbearing.
 - € Some want to get the consumer as much information as possible **quickly**.

“

"Customer service is as important now as it's ever been. Shoppers are more savvy than ever before and they really expect a high level of service. If you give them that, it's half the battle."

”





RETAILERS AND SHOPPERS SHARE FRUSTRATIONS

- € Like shoppers, retailers struggle with the limitations of the financial industry and their bias against Manufactured Homes.
- € Retailers also have to overcome the land/location hurdle as much as shoppers. If their shopper doesn't have a place to put the home, they can't sell it. Some retailers suggest real estate agents but it's an aspect of the sale that's out of their hands.



“

“Banks have a stigma that doesn't help. For example, MH don't qualify for refinancing which leads to the misconception about the quality and depreciation in value of a MH. In fact, the value goes up if you take care of it. Like a regular home.”

”





RETAILERS CAN DO MORE TO PROMOTE EE

- € Most retailers are not pushing Energy Star or EE—they only talk various options when a customer initiates the conversation.
 - € Retailers say the manufacturers make some choices for them – like hot water heater and furnace so they don't talk about those aspects unless the buyer asks.
- € Retailers post some energy efficiency information in the lobby of their office.
 - € American Home Centers in Billings uses EE as their selling point—their product is “above standard for everything” and they feel that gives them an advantage in being ahead of the curve.
 - € Clayton highlights their Energy Smart information (which is somewhat misleading vs. Energy Star).
 - € The Home Boys in Spokane post information about why a consumer benefits from a 2x8 exterior wall and R51 in the ceiling (they post features but when asked, the dealer said people spark to the idea of staying warm/cool, comfortable, higher quality)

Use EE communication in a way that emphasizes quality, comfort and savings over time (see quote on this slide).

- € Balance the additional ‘investment’ required to upgrade as a percentage of the total cost so that shoppers understand that small upgrades add up to a lot more in the long run.



“

“We only sell 2x6 or 2x8 exterior walls and R51 in the ceiling. Only mobile home park owners will buy 2x4 exterior walls b/c they don't pay the bills.”

”





INCENTIVES AREN'T THE MAIN MOTIVATION TO UPGRADE

Retailers say incentives from the power companies help but aren't the main motivation behind consumers decisions to upgrade to a more energy efficient home. There has to be more than just a one-time incentive for shoppers to become motivated to upgrade.

- € Retailers often mention rebates at some point as a 'sweetener' but rely more heavily on the longer term impact of EE choices so that the value lives on beyond a one-time rebate.
- € One particularly successful approach retailers take is to reframe the expenditure... *"The Energy Star upgrade is an easy sell. They are either going pay me or the power company. And if you pay me it'll be a LOT less money."* This also plays on the belief that EE upgrades are higher quality so why not buy them?



“

"Incentives are easy to get so it helps but it plays a pretty minor role. I think most buyers would upgrade even without the rebate once they understand how much better it is."

”



TARGET RETAILER: ROB



AGE: 38

OCCUPATION: Manufactured Homes, Sales
LOCATION: Boise, Idaho; higher-end of MH industry currently selling quality or Energy Star homes

ADJECTIVES: honest, conscientious, transparent, friendly, self-aware, tech-savvy, successful

MOTIVATIONS

- Happy customers
- Less complaints and rework
- Reputation —repeats and referrals
- Growing self and business

GOALS

- More sales!!!
- Thought leadership
- Integrity in the workplace

FRUSTRATIONS

- Length of the process
- Access to financing
- Long lead times at factories
- Obtain and keep good sales people
- Working with local jurisdictions to get permitting competitive

I want to sell the best out there...if it's a good product, it's the right thing to do.

I'm not trying to sell you what I have, I'm trying to build you what you want.

