

What a combined experience of more than 100 years in the housebuilding industry teaches you:

OUR ESSENTIAL GUIDE TO INCREASING NEW HOMES SALES

Not to blow our own trumpet, but in the last year ContactBuilder has helped to facilitate nearly £3billion in sales on 737 new housing developments nationwide. On the following pages we'll share with you some essential and oft-overlooked best practices that our team has learned over the years about increasing sales for our clients.



ContactBuilder
contact-builder.co.uk



Know your prospects

Never lose a sale by losing touch

In this industry it's all about the relationships built with your customers, essentially making them feel valued and appreciated. One way to do this is to stay in touch, whether that's via emails, phone calls or text messages. You can foster relationship building and encourage efficiency throughout the entire sales team by including all the right features and processes in your customer relationship management (CRM) system.

Stay in touch in all the right ways

Contacting your customers at the right time and in the right way is essential to creating the perfect customer journey and increasing customer care and satisfaction levels. If your CRM system integrates with top third-party apps like Campaign Monitor for email and Fast SMS for texts, it allows your team to keep tabs on their marketing communications and to contact each customer how and when is best; an email or a text message at the right time with the right information.

Building great relationships

There is no one way to build a great relationship with a prospect, but there is a framework to which your team can work to ensure they are meeting the right touchpoints with them. Whether your incoming leads are from your website, property portals (via third party app integration) or visits to site, a predefined workflow of tasks can be assigned to them. This ensures that your friendly and knowledgeable team has a great framework to follow.

Sharing pertinent details

Every interaction with customers and potential customers is a golden opportunity to build rapport and deepen that relationship. It's key that your entire sales team commits to entering details from interactions (site visits, phone calls, etc.) with each customer onto a customer's contact page. Keeping track of important details, like a preference for a large kitchen/diner or an issue they're having during the reservation process, can make or break their satisfaction level.

ContactBuilder offers:

Tracking prospect and client interactions	✓
Integration with top property portals	✓
Third party integrations for email and SMS	✓
Customisable pre-defined workflows	✓





Work smart, not just hard

Save time and increase efficiency

Every task completed - sales, admin or otherwise - is vital and brings your team one step closer to a sale. Could they be using their time more efficiently by using a cloud-based lead management and CRM system? They almost certainly could. Giving your team the tools to stem the flow of time spent on administrative actions and processes, including data entry, diary management, spreadsheet upkeep and filing, will leave them more time for sales actions.

Reporting for duty

A system that offers easy and comprehensive reporting on your sales pipeline allows you to track the time frame between reservation and exchange, monitor the number of visits or interactions needed to make a sale, see which of your team members are crossing items off their task lists and entering their interactions with customers, and so much more. Make sure your reporting suite gives you access to data and statistics regarding sales progression, sales and marketing, administration and management.

Automation not data entry

When it comes to data entry you only want to do the job once or, the ultimate time saver, not at all! A system that automatically imports leads and contact information from popular portals or automatically populates documents with a contact's data is a huge time saver.

Adaptable workflows

Customisable, predefined workflows are an advantage for any sales team. The ease with which task lists can be applied to your hot prospects and other customers ensures that every team member will have clear priorities for their day. If additional tasks are required that fall outside the workflows, adding them should be very simple. A CRM system will ideally include a separate task list for each user, making the system even more effective and allowing your sales team to be as well. Workflows and task lists allow your team to keep track of everything with ease, including phone calls, site visits, reservations and move-in dates. It's diary management at its finest.

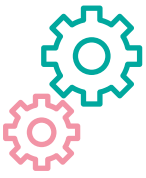
Consistent and time saving

Additional time saving tools include email and SMS templates. These should be very easy for your team to build, ensuring all written communications received by your prospects and customers are on brand and consistent. Such templates will also increase your team's efficiency, allowing them to simply add in any additional relevant details to personalise and refine their communications.

ContactBuilder offers:

Comprehensive, flexible reporting suite	✓
Auto-fill for documents and emails	✓
'My Tasks' feature for easy diary management	✓
Creating group or individual tasks	✓
Ensuring customers receive a prompt and appropriate response	✓





K.I.S.S (keep it simple, stupid)

Ease of use

When choosing a CRM and lead management system, it's important to choose one that's easy to use, not just for your management team but for those who will be using it every day on the ground - your hardworking sales team. They don't want to be intimidated by a new system that's complicated to navigate and understand; in fact, if they are intimidated, they won't use your new system to its full potential.

Getting your team on board

Contacting your customers at the right time and in the right way is essential to creating the perfect customer journey and increasing customer care and satisfaction levels. If your CRM system integrates with top third-party apps like Campaign Monitor for email and Fast SMS for texts, it allows your team to keep tabs on their marketing communications and to contact each customer how and when is best; an email or a text message at the right time with the right information.

Behind the curtain

There is no one way to build a great relationship with a prospect, but there is a framework to which your team can work to ensure they are meeting the right touchpoints with them. Whether your incoming leads are from your website, property portals (via third party app integration) or visits to site, a predefined workflow of tasks can be assigned to them. This ensures that your friendly and knowledgeable team has a great framework to follow.

ContactBuilder offers:

User friendly system	✓
Intuitive UI	✓
Dashboard bespoke to user level	✓
Fully responsive across desktop, tablets, and mobile	✓
Friendly, knowledgeable trainers	✓





Data led and sales driven

A treasure trove of data

When it comes to new homes sales the information you have gathered on your prospects can make or break a sale. From managing contacts entered from various internal and external sources to the full record of each individual contact's interactions, you want to consolidate the data that matters to you.

Information at your fingertips

It's called the Information Age for a reason and data is the most important thing you can have on a prospect or customer. Make sure your team can reach the information they need on a daily basis from their own login, including reports, contacts and their interactions, sales progression and daily figures. When you can set access by user level it keeps things simple without cluttering up individual user accounts with extraneous elements.

Finding the information you want, when you want it

Retrieving the information in your CRM database shouldn't be a lesson in frustration. What you want is a system that is simple and straightforward, using as few clicks as possible. Whether you're looking to prioritise your day by those who need a phone call or your hot prospects, you need dynamic search filters and an easy to use reporting suite to make your data access easy.

Zero-effort lead capture

You want third-party app integration; it is the best in lead capture technology. You also want it to be built into your CRM system as a seamless transfer of data from applications such as Zoopla and Rightmove and from your own website. With every prospect entering their information themselves, their details are as accurate as possible and will automatically populate a new record in your CRM system. Available all day, every day with zero effort on your part.

Efficient contact management

Every customer you have is, or started off as, a lead and you need a system that allows comprehensive data collection on interactions, tasks, tracking via email or web and the reservation process. Collecting this information throughout their customer journey should be simple and efficient, allowing for a detailed contact search, and setting of relevant and helpful contact statuses.

ContactBuilder offers:

Consolidated data on all leads and customers	✓
Monitoring activity (sales, marketing, etc.)	✓
Automatic data transfer between third party partner apps	✓
Dynamic search filters	✓
Data collation for all contacts	✓
Contact status display	✓





Click and reserve

Processing reservations through to completion

For house builders, a CRM system is needed that goes beyond the marketing stages, prospect management and the act of making a reservation. You need a system that facilitates the processing of reservations through to completion with a log of steps taken and documentation storage: basically, a secure, comprehensive record of the entire process.

Tracking completion steps

The process leading up to completion can feel long and arduous for both you and your customer. It's complicated and accompanied by a large amount of paperwork, which can mean that steps could get missed accidentally or happen out of order. A CRM system that keeps a record of the required tasks and allows the steps to be logged against them will make the entire procedure simple and effortless for your team and your customer.

Upload and share

Instead of having thick paper files for every reservation, use a system that allows you to scan, upload and share your paper documents among your team. Not only will this save you space, it will also save you time as a digital file within a CRM system can't be misplaced or misfiled and more than one person can access a digital file at a time.

A focus on customer care

Some of the better CRM systems allow you to add on an optional module for a customer portal. Such a portal allows for effortless communication between your sales team and your customers, completely within the CRM environment. Using this system enables your customers to easily update your sales team with pertinent sales details, such as a change in solicitor details, or confirmation of their mortgage offer for example. Post-completion communications are also dealt with easily and privately, with customers able to detail snagging issues they may encounter. This allows your team to manage these issues quickly and efficiently to ensure your customers remain happy with their experience.

ContactBuilder offers:

Creating a workflow specifically for reservations	✓
Setting milestones and priorities	✓
File storage for documents	✓
Secure system meeting GDPR standards	✓
Customer Portal	COMING SOON



We asked our clients:

I really love the ContactBuilder system; we've only had it a few months but I wouldn't be without it now.

Tina Hall – Site Sales Adviser,
Peter Ward Homes Limited

Gives us a tactical edge over our competitors by improving the speed and consistency of our response to sales enquiries.

Chris Sams – Financial Director, Rowland Homes Ltd

ContactBuilder has transformed our sales progression and now it is much easier to know where each case is up to and monitor performance. It's a really simple and effective system which I would recommend to anyone.

Alison Gittins, HomesHub

Absolutely vital to the everyday running of our business. Without it our sales team wouldn't function.

Suzanne Hallworth – Head of Sales & Marketing,
Seddon Homes

An essential component in our sales and marketing strategy.

Russell Denness – Managing
Director, Croudace Homes Group Ltd

Helps to increase visitor and reservation levels.

Colette Gannon – Sales Director,
Watkin Jones Homes

Prompts us to follow up on tasks and it's 100% accurate. A great investment.

Kelly Toms – Sales Manager, Barwood Homes





**Get in touch or book your
free demo today:**

Call

01889 742 021

Email

sales@contact-builder.co.uk

ContactBuilder Ltd

Third Floor
Towers Point
Towers Plaza
Wheelhouse Road
Rugeley
Staffordshire
WS15 1UN



ContactBuilder
contact-builder.co.uk