THE HOME BUILDER'S GUIDE TO

Mastering New Home Marketing with Your CRM

LASSO™
An ECi Software Solutions Company

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CRM IS A CORE TECHNOLOGY THAT HELPS YOUR BUSINESS RUN MORE EFFECTIVELY.

Not only is it critical to the sales process, but CRM also provides great benefits to marketers. In fact, your CRM is where sales and marketing come together to understand lead source and quality, improve communication, and convert more prospects to buyers.

As a marketer, you need to make sure you're taking advantage of all the features and functionality of your CRM so you can make your marketing campaigns more impactful and effective. This includes capturing, tracking, nurturing, and most importantly, understanding the leads you're generating.

Here are four ways to master new home marketing by leveraging your CRM:

1. Capture every lead automatically for faster lead follow-up.
2. Segment your database and create targeted emails for more relevant campaigns.
3. Use email and website analytics to improve your campaigns.
4. Nurture and engage with your leads more efficiently by building follow-up processes with your sale teams.

Your CRM is where sales and marketing come together to understand lead source and quality.

Capture Every Lead Automatically

Generating quality leads for your sales team is the number one priority for every marketer. It's also important that these leads are automatically entered into your CRM in order for your marketing programs to run more efficiently.

By automatically feeding leads into your CRM, your sales team can reach out to prospects immediately. There's no risk of a sales agent forgetting to enter the information or entering it incorrectly. Each new lead can be automatically assigned to a sales agent and rotated appropriately among team members.

In addition, your CRM needs to capture the source of the leads you're generating. Whether it's from your website, a listing directory, or even a social media network like Facebook, you need to know where your leads are coming from so you can spend your marketing dollars wisely.

By capturing leads (and lead source) automatically, your company has full transparency into the prospects interested in your community. Both marketing and sales can see the quality of leads and where they are coming from.

You need to know where your leads are coming from so you can spend your marketing dollars wisely.

Email Marketing: Creating Targeted Campaigns

With 99 percent of people checking their personal email every day, some checking as much as 20x a day across their devices, consumers still prefer to receive emails from brands that they are connected with.

Given email's important role in communicating with your prospects, it's vital that your CRM has integrated email functionality that makes it easier to:

- Segment your database and build lists for your campaigns
- Create mobile-friendly emails
- Provide greater transparency for your sales team

Easier Segmentation and List Building

Your CRM collects a lot of data about registrants. Some data is collected behind the scenes (such as pages visited, social media profiles, or engagement with your emails) and some data needs to be entered into the system (such as how they heard about your community).

However, in order to make this data useful, you need to segment prospects in your database and build targeted lists for your campaigns.

TIP:

Your CRM is gold! You worked hard to generate the leads in it--find ways to leverage the existing prospects in your database for your new projects!

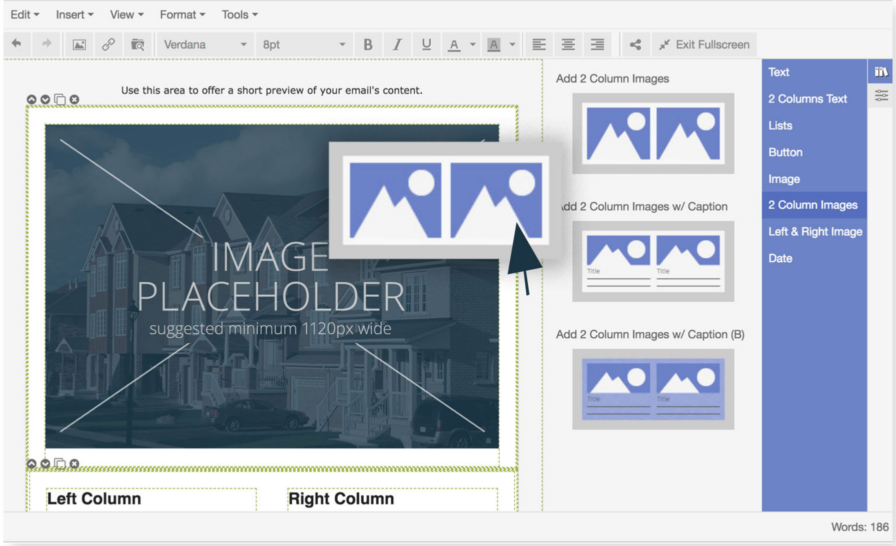
Adding questions to your CRM that gather information about lifestyle or home preferences will make your marketing more effective. If your next project is located near downtown, you should be able to pull a list of potential prospects in your CRM who are looking for a new home within a certain distance from downtown and send them an email featuring the new property. This type of information gives your sales team a head start and helps you generate quality leads for them.

By using the standard fields in your CRM, as well creating your own custom marketing questions, you can develop targeted campaigns that will be more relevant to your prospects.

Easy-to-use Email Editor

Since almost half of people are opening emails on their phone, it's essential that your CRM's email editor can create emails that look great on a mobile phone, not just a desktop.

Additionally, by leveraging the email editor in your CRM, new leads that are automatically entered can be sent an auto-reply email once they have registered on your site.



You don't need to be an email designer to create mobile friendly emails. Make sure your CRM provides an easy-to-use interface.

Setting up an auto-reply email is important for two reasons.

1. When potential buyers submit a form on your website, they expect some type of instantaneous response. An auto-reply email is the easiest way to achieve this.

2. The auto-reply email is one of the highest read emails—4x the open rate and 5x the click through rates—so take advantage of it by including additional content about the project or community they are inquiring about. Include links back to your site, to your social media accounts, videos, or an additional call to action to encourage further engagement.

Greater Transparency

Since sales and marketing teams share the same CRM, sales people can view the emails that you're sending and see if the registrant opened or clicked on that email. This kind of lead intelligence helps your sale team customize their follow-up communication.

For example, if a sales agent sees that the registrant has clicked on the email featuring the new project near downtown, the agent can reach out by phone or email to engage with the prospect further.

By sharing this type of information across teams, home buyers have a better customer experience--they receive more relevant information about the community they are interested in AND at the right time.

TIP:

Your auto-reply and follow-up emails should acknowledge which directory site they came from and provide links to your own website to give the prospect a more complete picture of your community or project.

Email and Website Analytics

In this data driven world, collecting information about your prospects' behaviour is important. As a marketer your CRM needs to collect data on your email campaigns and website.

Email Analytics

The email looks great. The copy was sharp and on point. You hit send and grab some coffee. But that's not the end of the campaign. The real work begins when you review your campaign's performance.

Opens, clicks, click-to-opens...as marketers you can never have enough stats. You need to use these analytics to figure out what's working and what's not. If the campaign didn't perform well, compare your open or click rates with prior campaigns and see if it's an issue with subject line. Maybe the content wasn't quite right for the list or maybe it was the list itself. Whatever the cause, use the information you gather to improve on the next campaign and keep testing your emails to get better results.

In addition to some of the general email stats about whether they clicked on a link, you can also use your analytics to take a look at which links were the most popular in your email. By adding your CRM's tracking tokens in your email campaigns, you can gain visibility into the specific links that prospects clicked on to track engagement.

TIP:

Pull the list of prospects who haven't opened your last email and send them the information again. Resending the email to these "non-responders" with a new subject line and a few tweaks to content can sometimes mean a 15 to 20% bump in your open rates.

Some metrics to review with your email campaigns include:

Opens/Open Rate

Number and % who opened your email. Please remember, open rates are a great guide but there are two caveats: 1) Some email clients automatically respond as "open" if the recipient uses a preview pane. 2) Some emails don't register as "open" if the recipient doesn't display images in their email automatically.

Unique Clicks/Click Rate

A good stat to help understand the level of engagement and shows specific links have been clicked.

Click-to-Open Rate

This is a great number to get an understanding of engagement—of those who opened the email, what percentage engaged with your campaign?

Unsubs/Complaints/Opt-out Rates

This number can be seen as a health check on the list you're sending to or content of the email! If you're getting a high % in these categories, you need to take a closer at your list or relevancy of material.

Mass Mail Summary

Subject	Opened	Open Rate	Unique Clicks
New Home News – January	246	17%	39
How's Your Search Going?	967	13%	177
Everything is looking great!	246	18%	32
New Homes News – December	351	14%	56
We haven't heard from you lately	351	24%	32
New design center iat Harborview	1,424	20%	100
Fantastic new suites available now!	246	17%	39
New Homes News – November	351	28%	56
There's more to to be expected	1,725	24%	213
	5,075	**19%**	**618**

TIP: Add a Google UTM to the end of your links to make sure you're also tracking your email campaigns in Google Analytics.

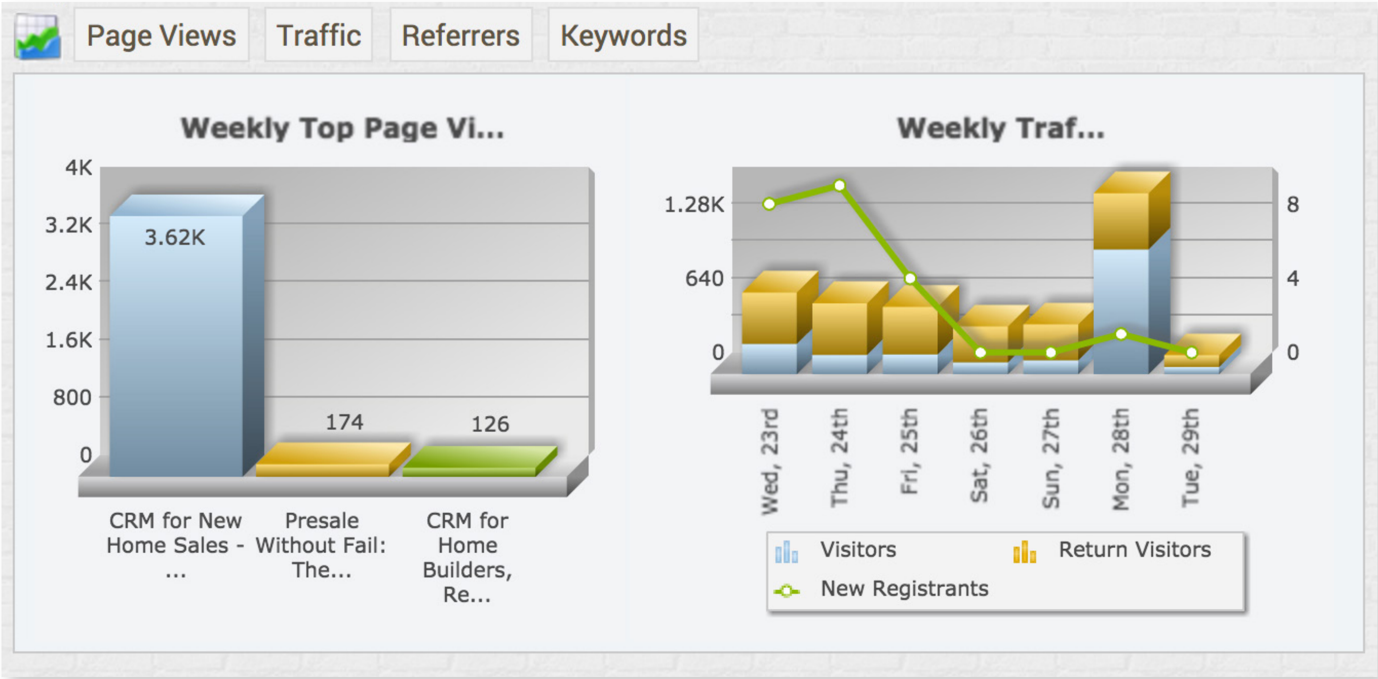
Website Analytics

While Google Analytics gives you a macro picture of who is visiting your website, your CRM's website analytics shows you the specific page your prospect visited. Now you can know what web pages they were looking at—learn which communities or floor plans they reviewed, and find out how many times they visited your site. This level of granularity allows your sales team to have more meaningful interactions with prospects.

In addition, your CRM should send an email notification to your sales agents when a visitor has returned to your website. This information provides your team with an indication of how engaged the prospect is and sales can respond accordingly.

TIP:

When prospects click on the links to your website, your CRM analytics tracking cookie will show their engagement on your website and notify you when they are visiting.



Nurturing Leads Through the Sales Process

Your job doesn't end when a new lead is added to your CRM. You can't just rely on ad-hoc, larger email campaigns to get your prospect's attention. People need to see your messages repeatedly in order to realize that you're talking to them! That's why you need to nurture each lead to ensure they are followed up with so no lead is left behind.

Getting that initial auto-reply email is an important first step, but you also need to create a follow-up process with your sales team that makes it easier to convert prospects to purchasers.

Build Processes Based on Lead Source

Not all leads are the same. A lead coming from Facebook or a third party directory won't have the same information as someone who has visited your website based on a web search. Third-party leads may need a lot more information about your company in general while those leads from who have visited your site based on organic searches may need more information about specific communities.

Your CRM should set the follow-up steps that your sales team needs to take. Get feedback from your sales team to better understand the differences in the lead types and work with them to find the best cadence (and content) to convert leads to purchasers. Nurturing doesn't only mean "marketing emails". Set up a process that schedules reminders for calling, video emails, and personal communication sent from the sales agent.

REMEMBER:

Your CRM should give sales the option to take control of which emails are sent and when, since they have a better understanding of where the prospect is in their buying process. You don't want to send 'top of the funnel' emails when the prospect is ready to purchase.

Putting it all Together

Your CRM is the hub for the sales and marketing activity in your company--all your prospect and customer data lives there. As a marketer, learning how to leverage your CRM will make your job easier. Take advantage of the analytics, email functionality, and sales processes to improve your marketing and help your sales team sell more homes.

"As marketers, we can help sales by crafting stories to help them build urgency or overcome objections. Go into your CRM and look at appointments and sales ratios in addition to leads. CRM will give you the data you need to craft a story that's relevant to your audience. It gives marketers full transparency if they commit to diving in. "

KEVIN OAKLEY
Do You Convert