No Lead Left Behind: How to Launch an Online Sales Program
INTRODUCTION

The right online sales program will increase your bottom line results. Guaranteed.

The arguments are over, and the facts are in. Your prospects have gone digital. Are you adapting to the shift in consumer behavior fast enough?

In this guide to launching an effective online sales program, you will learn the three key components that must be in place to get the results you desire.

1) An Online Sales Counselor
The human element is still critical despite improvements in technology. You’ll learn what this position entails, what to look for when hiring one, and how they should interact with the rest of your sales and marketing teams. Once in place, they should convert over 20% of leads to appointments.

2) A Cloud-Based CRM
Your online sales counselor needs to have an efficient system that can be accessible no matter where they are or when they need it.

3) An Online Sales Process
The strategy of when to follow up, and what to say to any prospect in the CRM.

ABOUT THE AUTHOR

Sara Williams won the 2013 NAHB National Sales and Marketing Council Gold Award for Online Sales Counselor of the Year for her work at Heartland Homes. There she led and managed a team of online sales counselors that participated in over 50 percent of all company sales.

With over a decade of new home sales experience, she now is a Director of Sales at Lasso CRM. She is passionate about helping home building professionals better understand the value of a CRM and online sales system to their bottom line results. You can reach her at sara@LassoCRM.com.
SECTION 1: The Online Sales Counselor

What is an Online Sales Counselor?

An Online Sales Counselor (OSC), or Internet Lead Specialist, is an individual dedicated to handling all leads that come through the builder, developer, or agency's website and secondary advertising sources. Often, they also handle incoming phone calls from those same sources.

An OSC qualifies and nurtures leads using a predetermined sales process and marketing automation tools. Their goal is to drive qualified traffic to the on-site sales team via scheduled appointments.

Do you need an OSC?

Everyone today – 100% of your prospects – either use the internet in their new home search, or are influenced by someone who does. Due to the complexity of the information gathering process when shopping for a home, buyers reach out beyond the websites they browse to look for additional insight.

If there is someone waiting to engage with these buyers once they request this information, there is a higher chance of converting them into sales. In the 2014 Online Lead Follow-Up Survey, a joint study with Lasso CRM and Do You Convert, communities with an OSC responded 35% more often, and 25% faster than those without an OSC. An OSC with a good follow-up process will convert 20-25% of online leads into appointments.
Do You Need an OSC? (continued)

Digital advertising and web development is often 50% or more of a builder, developer, or agency's marketing budget. Money is spent to direct consumers to a website in the hope of engaging with them there. Once a prospect fills out the registration and contact information on the site, this information is often incorrectly managed - or even ignored! An OSC crosses the chasm between your online prospects and your traditional sales team. Without a dedicated individual, much of this digital focused marketing spend is wasted.

All leads should be captured in one central database - a Customer Relationship Management (CRM) system. Your OSC can then efficiently follow up with hundreds of new prospects every month, while also routinely and proactively reaching out to older leads. Once you have the right OSC in place, you'll realize how many prospects have been leaking out of your sales funnel.
Tips on Hiring an OSC

The screening process for your OSC should be unique from other positions you hire. This is because the majority of the communication with an OSC candidate should be done via email or the phone. Your prospects will be interacting them through these methods as well, and so how the candidate performs in a standard face-to-face interview is less important. You are primarily looking for fast response times and quality follow up via email, and a warm inviting feeling on the phone.

An existing sales person in your organization who connects and communicates well with prospects, but who struggles with closing prospects in person may be a great option. They already know your product and culture, and while closing is part of an OSC position as well it often occurs more naturally than in a sales office. When in doubt, **focus on the list of attitudes instead of skills.** Skills can be coached and trained over time - attitudes cannot.

### The Attitudes of a Great OSC:
- Self-motivated
- Driven to win
- Customer service oriented
- Outgoing
- Organized
- Efficient

### The Skillset of a Great OSC:
- Proficient with technology
- Good writing skills
- Strong phone skills
- Knowledge of a sales process
- Connecting with prospects
- Efficient use of the CRM tool
The Next Step

Now it’s time for training and preparation. An OSC should have a study guide of communities, visit each community, and get to know each on-site agent personally. Here are some examples of information an OSC should know so they are prepared when potential customers call or email asking for information:

- Community name
- School district
- Sales agent
- Address / GPS coordinates
- All phone numbers
- All email addresses

Product & Pricing:

- Home types and floor plans
- Pricing for new builds or inventory homes
- Included features of the homes
- Amenities of the community
- Unique selling proposition (USP)
- Home Owners Association / Condo Association Info
- Community site maps with updated availability

Buyer Profiles:

- Where are they likely moving from?
- What are likely motivations for moving?
- Where will buyers likely work?
- What demographic does the project cater to?
Choosing the right CRM system comes down to two things: Will they use it? Can they use it wherever they are, and on any device?

Accessible Anywhere

Professional photographers have a saying that “the best camera is the one you have with you.” CRM systems are no different. The only system worth investing in is the one that you can bring with you wherever you are, and on any device you choose. An OSC should be able to access the database on a smart phone, tablet, or computer. Prospects may call or email the OSC at any time of day, so easily accessing a cloud-based CRM makes following up more productive.

Don’t Make Them Think!

It is critical to have a system that allows the OSC to schedule next activities/steps with a prospect. When managing hundreds to thousands of leads, it can be difficult to remember what should happen next with each individual customer. Having a system that allows you to enter call or email activities as a reminder is invaluable and prevents anything from being missed.

Lead Scoring / Rating

Scoring or rating your leads allows the OSC to organize and group prospects for targeted follow up. It is important that your CRM system be able to adapt to your existing rating system to avoid confusion. In periods of extreme workload it also allows the OSC to focus time on the customers with the highest likelihood to convert.
SECTION 2: A Cloud-Based CRM

Email Integration

An OSC needs a system that tracks emails back and forth between a prospect and sales agent. Having this type of integration allows for less copying and pasting, and avoids missed notes. This extra information is critical to allow the OSC to quickly recall relevant data when speaking to a prospect.

Email Marketing

An OSC can send dozens of email templates a day. With a CRM system that allows the storage of template emails and marketing campaigns, and allows for customization when necessary, there’s no need to save documents in Word or other software.

Also, when an OSC sends out a similar message over and over again, having templates saves time, energy, and keeps the message consistent. **Integrated templates for marketing campaigns eliminates the need for a secondary email service.**

Finally, some CRM systems allow **integrated tracking and reporting for all email activities.** These can include alerts sent directly to your OSC when a prospect clicks on a link, or returns to your website after registering.
Custom Lists and Groups

Lists and groups allow an OSC to be very specific with prospects’ needs and wants, and market to them very easily when a certain home becomes available. For example: Creating a custom list of all prospects interested in homes at a certain price point would allow the OSC to quickly alert buyers when a new home falls in their price range.

It also allows all co-op agents and prospects to be organized in one central database. This gives everyone the ability to keep track of agent/prospect relationships, send emails to both parties at once, and access real-time co-op reports.

Reporting Made Easy

With the touch of a button, managers should also be able to view sales agent and prospect activity, and analyze reports for better decision making. **If the data is entered into the CRM system, you should be able to pull it out quickly and efficiently.** If your sales and management teams can't get the data they need easily, then they won’t include it in their decision making process.

Website Analytics

With this feature, OSCs know where online prospects come from, which pages they are viewing on the website, and they are alerted when prospects are on the site. This information is helpful for understanding the buyer profile and website engagement.
SECTION 2: A Cloud-Based CRM

Data Entry is Evil

When someone registers on a builders’ site or a secondary site, such as a listing directory, that registration should go directly into a CRM system to eliminate human error and time spent on data entry. When a website is integrated with the CRM, all data is tracked and stored in the prospect’s profile. OSCs can quickly prepare for their next interaction with prospects by seeing this information, as well as the last type of contact and what was discussed.

Marketing Automation

A predefined process and path frees an OSC from setting daily tasks and reminders, and allows them to focus more on deeper prospect interaction. They remain in complete control; however, proven systems support them and suggest the next step to take with each lead. These processes are often customized by the lead source, lead quality, or lead responsiveness.

Don’t Be a Robot

A CRM should work specifically for a company and its unique business processes. The ability to adjust the system to your unique style of business should not be undervalued. Even companies with very similar business models often have dramatically different cultures, sales processes, and brand standards. This ability to personalize can dramatically increase the adoption rate by your team members because it will feel more familiar right out of the gate.
SECTION 2: A Cloud-Based CRM

Don’t Be A Number

The CRM system is more than just software. Make sure your provider is able to offer more than a wiki or online user guide. You'll need the help from actual humans to get it launched and make it run smoothly. Look for an accessible help desk with both email and phone support. They should know your name, and get to know your company - not just your customer ID number.

Don’t Be Intimidated

There is a lot to consider when selecting a CRM system, and it can appear overwhelming at first. Use the process of shopping for your system to put the potential providers to the test. Many offer their own version of an OSC to help answer your questions and address your concerns. You can request private demos of the system, and let them know your concerns. Delaying your search only causes your inefficient system to lose more sales.

“Our goal is to get to know you on a first name basis - and then become a helpful extension of your marketing and sales team.”

Angela McKay  
VP of Marketing & Client Experience
Lasso CRM
**SECTION 3: An Online Sales Process**

**What is an Online Sales Process?**

The term online sales process is used to describe the follow-up process that will be used by the OSC. These processes often include a mix of many different follow-up types: phone calls, emails, video emails, mass mails, and more!

Beyond the type of follow-up to be used, **it addresses the total volume of follow-up - as well as the period of time between each step.**

Having a well defined sales process allows the OSC to be efficient with their time because they do not have to consider the next step for each prospect. The recommend next step is always there.

Of course, this doesn't mean that the OSC shouldn't be able to override the default next step. Your process - and CRM system - need to be flexible enough for them to make adjustments on the fly. **This is not artificial intelligence, but a planned process.**

**Dive Deeper**

For more information on creating an online sales process, view the Lasso webinar: **Keep It Simple – Creating a Sales Process that Works.**
SECTION 4: Common Objections

My Current Sales Teams Should Do This Stuff!

It’s not that sales agents can’t handle online leads; they just can’t handle them as effectively as an OSC. Sales agents have a myriad of activities to manage on any given day: walk-in traffic, negotiations, contracts, lenders, inspectors, etc. If they are busy with prospects sitting in front of them, how are they going to have the time to follow up properly with other leads? This is a time-consuming, essential sales task – and where the OSC is most effective.

On average it takes seven touches, or contacts, to trigger one response from a prospect. That’s a lot of calling and emailing! Most onsite sales reps reach out only two or three times, if at all. If an online lead costs between $100-$250, there’s a lot of money wasted by builders’ agents who don’t follow up. All the more reason to have at least one OSC designated to handle all online lead follow up!

Onsite sales people tend to be “hunters.” They like the thrill of the hunt, and they struggle with any communication other than face-to-face meetings because they like the instant feedback. An effective OSC is more of a farmer constantly watering and fertilizing their fields to predictably produce a high-yield crop.

Another reality is that no matter how hard your onsite teams try to present themselves as impartial, the prospect knows better. An OSC, on the other hand, is often viewed as a trusted confidant. Prospects will be more open and honest with them because they don’t “feel” like a sales person, but more like a fantastic home shopper concierge.
SECTION 4: Common Objections

**Tension Between Online and Onsite Teams?**

We understand where this concern comes from, but potential tension can be avoided. There are many ways the onsite sales team can utilize an OSC, and they will grow to see them as a valuable service. **An important step when they first start working together is to be sure each person knows the other person’s role within the company.** If the onsite sales team does not understand what an OSC does, spend extra time on this. Also, be sure the OSC understands the role of the onsite team. Here are ways they can leverage one other:

- **Communicate after each appointment**
  Once the OSC schedules an appointment, the onsite team should communicate back to the OSC how it went/what happened, along with next steps. If the prospect was not a good fit for the community, the OSC can adapt based on the feedback.

- **Share regular community updates**
  The onsite sales team should keep the OSC abreast of all community information, because the OSC is selling that community too. They should know about all special events, promotions, incentives, and offerings.

- **Collaborate on challenging prospects**
  Work as a team to solve problems with a prospect and help close the customer/prospect together. The OSC typically works as a neutral party. Prospects tend to confide in the OSC and let them know the real reasons for hesitation or indecisiveness.

- ** Appreciate each member’s unique roles**
  The OSC needs to recognize that without a strong onsite team, they will not succeed. A lack of appreciation on either side can undermine the entire online sales program; it’s up to management to monitor and keep everyone working together in harmony.
It’s Time To Get Personal.

I’ve shared with you the three keys to launching a successful online sales program, but now I’m going to share my own personal story with you.

I started out in the building industry as an onsite agent in 2004, but I didn’t feel as fulfilled as I wanted to. In the summer of 2007 I was offered a job as marketing coordinator; part of the job would be to handle online leads.

In the past, our old marketing director would pass online leads to onsite agents within a week or so of them coming in, or whenever she had a chance to get them out. In turn, the onsite agents rarely paid any attention to them. I, however, worked for a new marketing director who championed having an online sales program. This was all so new that I had no idea what to expect.

The “online sales” aspect of my new job would be to respond to any online lead that came in as quickly as I could and try to schedule an appointment with an onsite agent. This would just be a portion of my job because, at the time, we did not get a lot of online leads.

“No problem!” I said. I knew all of our communities, our floor plans, and all of our sales agents. I would be paid a commission on completed appointments and I would be paid again if the prospect bought a home. This peaked my interest. I’m a sales person at heart! I love working in a commissioned environment. So, within 24 hours of offering me the job, they turned all of the company’s online leads over to me.
SECTION 5: Sara’s Story

Growing Pains to Amazing Results!

When I started out as the OSC we did not have a CRM system. I used Excel, a notebook, sticky notes, and a pen. I was scheduling 15-20 appointments per month, and by the end of my first year, I had contributed 12 sales to the company. This was a big deal for us! In the past, our online leads never converted to appointments, especially sales. This was success for our company because we were finally getting incremental sales from our website. Into my second year, I was still a part-time OSC but things were picking up. I assisted in 24 sales that second year. This role was working!

Moving into the third year, we needed a CRM system. I could tell people were slipping through the cracks because I was not following up with them enough, they were buried in my notebook, or the sticky note got thrown out by accident. I was still a part-time marketing coordinator, and I did not have a “process” or a database. We also struggled to market to any of these leads without a central database.

We needed a CRM system that would allow all new leads to be automatically entered in a central database from our website and listing directories. It had to have an automated follow-up sales process, tasks, reminders, appointment scheduling, reporting capacity, and allow me to perform mass email campaigns. We decided to invest in Lasso CRM for the online sales program.

After three years, I transitioned into a full-time Online Sales Counselor. I assisted in over 60 sales that year. Over time, my numbers continued to climb. I was averaging 40 kept appointments a month and assisting in over 100 sales a year. The year I won the 2013 NAHB Online Sales Counselor of the Year Award, I had referred 152 net sales (9/1/11-9/1/12) and 100 closed homes.

Accepting my award for Online Sales Counselor of the Year from NAHB.
Why I ❤️ Lasso

I have used four different CRM systems while working for three different home builders. The one I felt was the most effective, and I had the most success with, is Lasso.

When we decided I needed a system to help track prospects, I was not sure what was needed. I had only used one other CRM while working for my first home builder, and it seemed hard to use and understand. Most important was ease of use. I also needed it to be a sales tool and not a hindrance to my daily routine.

It was recommended that we look at Lasso by industry professionals. I went to the Lasso website (just like a prospective home buyer!), had a look around, liked what I saw, and asked for a demo. I turned to my manager after the demo and said “I NEED THIS!”

After many years of using Lasso and other CRMs, I can tell you what I find extremely important in CRMs for the OSC role:

- Follow-up reminders on daily, monthly, and as-needed basis.
- Prompts to call or email prospects, along with reminders of past communication and what information to share with them.
- The right CRM allows anyone to function at superhuman capacity.
- You can stay in touch with thousands of people wherever they are in the sales process while being organized and efficient.

After 60 days of consistent use, the proof is in the increased number of scheduled appointments.

I hope this guide is a valuable resource to you as you begin your online sales program. Please don’t hesitate to contact me!

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The #1 New Home Sales CRM Solution

Wherever you go - we’ll be there.
Elegantly designed to work on the widest range of devices possible to keep your team productive wherever they go.

Effortless to use. Easy to personalize.
Our goal is to make CRM technology accessible, relevant, and more personal to you - and your customers.

We’re #1 in service too.
Current Lasso users are our #1 source of referrals. We’re there for you throughout deployment, training, and beyond.

“Simply put - Lasso CRM created immediate results for our online program.”
Steve Shoemaker
VP of Sales & Marketing
Ideal Homes

or call Sara Williams directly at 604.214.8557

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