

# What is the customer journey and how to do it

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Property Professionals

# Introduction

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**The customer journey is a buzzword that is thrown around a lot. But what is it? Also referred to as the sales funnel, this is simply the method of monitoring your customers as they advance through the stages of the sales process. Typically, these stages are Prospect, Nurturing, The Sale and Retention/Advocacy.**

In this complex age of the Internet, it is now easier than ever for customer to publish their own reviews on your estate agency to sites such as Which.co.uk. With word-of-mouth being the strongest form of advertisement, we understand it's more critical than ever that your customer leaves with a good impression of your brand- and that you maintain an exemplary reputation.

We know that landlords, tenants, sellers, letters and those looking to move are very different groups, but they have one thing in common- they all go through the sales pipeline, and you want to ensure they stay with you throughout.

It is crucial that your customers feel individually valued, and like you consider them to be VIPs- which, of course, they are! Your brand can lose credibility through communication that doesn't consider customer preference, no encouragement of feedback and poor timing of your messages, which is why intelligent and personalised communication is vital.

Why aren't you doing it already? We know the biggest barriers are data, time and know-how.

In another series we will cover off data, but this guide will tackle the know-how – what should you be sending to your customer, and when?

# The Prospect

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The Event:	Awareness campaign/'We just sold a house in your area!'
When to send:	Whenever you need new customers
What to send:	Direct Mail
Who to send to:	The prospective customer

With BriefYourMarket.com, finding new customers has never been easier. We allow you to access one of the largest sets of consumer data containing over 20 million households, so you can seek out the most suitable prospects local to your branch. Filter by variables such as age, location, gender and marital status in order to send out the most relevant Direct Mail campaigns.

We offer a wide range of Direct Mail pieces, from canvassing cards to bespoke print mailing, allowing you to make a memorable impression with prospective customers. And the best part? You don't need to be a designer to create your own; simply drop your chosen image, text and any offers to one of our templates, and we'll do the rest.

Our 20/20 campaigns work particularly well for property professionals; once you've sold a house, you can use our database to find out the names of the people within the nearest 20 homes either side of the one you've sold and send them a postcard with an image to say "We've just sold a house in your area!"

# The Prospect

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The Event:	Registration
When to send:	Immediately following registration/enquiry
What to send:	A welcome email
Who to send to:	The prospective customer

Get it right from the very beginning by making a memorable first impression with prospective customers. With BriefYourMarket.com, you can craft welcome messages that hit your customer right after they subscribe to you, or following their initial enquiry.

The welcome email is one of the most read emails, and research has shown that 60% of companies automate this message. It's the perfect opportunity to thank customers for choosing you, and create a successful relationship with them through laying down your brand tone and letting them know you're there when they need you. This is why automation is the only way.

An example of what to include would be an introductory offer, such as a discount on their first consultation or valuation. Your Social Media buttons/links should also be on the email, encouraging your customers to connect with you in these areas and boost your brand presence.

This is also a great chance to find out your customer's preferences, meaning that you only send them content that is relevant to their interests. For example, they may want to hear about your lettings advice, or their hottest new properties for sale.

# Nurturing

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The Event:	Property Offers
When to send:	2 weeks after enquiry/subscription
Who to send to:	The prospective customer

The only way to grow any relationship is to nurture it. This means consistently excellent content, as well as communication that is tailored to their individual preferences and showcases your brand.

Using our clever software you can stay in touch with your customers via a variety of communication channels, including Email and Newsletters, Direct Mail, SMS, Surveys and Letters. From guides to adding value to your customers' homes, to your top tips for selling, you can create intelligent campaigns that align with your brand and are relevant to customer interests. These channels should be integrated into the marketing mix, so that your customer is always happy to hear what you have to say.

Many customers at this stage will probably have questions that they want to ask you- but they aren't quite ready to take the next step and pick up the phone or book online. This is the perfect opportunity to send a couple of stunning emails that are dedicated to showcasing testimonials and your Which rating.

BriefYourMarket.com allows you to unleash your creativity, creating intelligent content that says, "We can solve your problems. Here's how."

Automation is absolutely vital throughout the Nurturing stage in order to keep your brand front of mind and convey your selling points. You can easily send introductory SMS messages and 'first impressions' surveys in order to gauge your customer's opinions. Then delve into your statistics to see what works for those individuals. This is an unobtrusive way of obtaining invaluable data that can help tailor your future communication that yields results.

The logo for BriefYourMarket.com is located in the bottom right corner. It consists of a white speech bubble with a black outline. Inside the bubble, the text "BRIEFYOUR" is written in orange, and "MARKET.COM" is written in red below it.

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# Nurturing

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The Event:	Booking confirmation
When to send:	After valuation/viewing booking
What to send:	Email
Who to send to:	Customers who have just booked a viewing or valuation

Once a viewing or valuation has been booked, you'll want to ensure it goes as smoothly as possible from the very beginning, by maintaining consistent contact with your customers.

At this point, they want to hear from you regarding their booking. With BriefYourMarket.com, the appointment confirmation can be automated so that it arrives immediately after the booking has been made.

This is a great opportunity to reach out to your customer and let them know you're there if they have any questions/ need anything before this important event, as well as reiterating the benefits of selling with you.

# Nurturing

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The event:	Valuation/viewing reminder
When to send:	1 day before
What to send:	Auto SMS
Who to send to:	Customers who have booked a valuation/viewing.

With the BriefYourMarket.com SMS feature, you can send automated text messages to your customers 1 day before their valuation or viewing. This is a great opportunity to say hi and to keep your brand front of mind. Your text message doesn't have to be lengthy; just like the rest of our features, it can be personalised and contain a short, upbeat message. "Hi Kelly! Good luck for your viewing tomorrow! If you have any questions, give us a call."

The event:	Lost instruction/sale
When to send:	1 day after
What to send:	'Sorry to Hear' email
Who to send to:	Customers who did not sell following attempt

It can be very demotivating for your customer when their sale falls through. At this point, it's more crucial than ever that you maintain your credibility and uphold your relationship with the customer. With BriefYourMarket.com, you can send out an automated email to customers whose sales fell through the day after, containing an apology message and suggestions of alternatives that may interest them, or top tips for selling. It's important here that the customer knows you are still supporting them, and that this is not the end of the journey.

# The Sale

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The event:	Sale Agreed
When to send:	On the day
What to send:	Email
Who to send to:	Customers who have successfully sold/let/bought a property

The achievement of a sale can signify some significant milestones. For one, it represents the peak of your customer's trust in you, culminating from a relationship based on faith and credibility. The time immediately after the purchase is the perfect opportunity to reach out to your customer and thank them for selling/buying/letting with you, whilst encouraging them to connect with you on other platforms.

Transactional data also yields more in-depth information about the customer's interests, and you can use this to upsell to them in the future, whether they're a fan of lettings advice or they just love auctions!

# After The Sale

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The event:	“Thank you” & request for review
When to send:	2 days after sale agreed
What to send:	Email
Who to send to:	Recent purchasers

Effortlessly send out an automated email to recent purchasers thanking them for choosing to manage their property selling/buying/letting with you, and encouraging them to submit an online review. This way, you’re showing them that you appreciate their custom, and value them as an individual. You can also take this opportunity to offer a discount on any future services they may require.

# After The Sale

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The event:	Survey
When to send:	1 day – 2 weeks from valuation
What to send:	Survey
Who to send to:	Existing customers

Create intelligent surveys with [BriefYourMarket.com](https://BriefYourMarket.com), allowing you to obtain helpful feedback from the people who matter the most- your customers. Surveys should be sent out post-purchase in order for you to find out what you're doing well, and what should be improved. With [BriefYourMarket.com](https://BriefYourMarket.com), can set up an automatic trigger survey, so that all new customers who call or visit on a Monday can have a survey waiting for them on Tuesday. Our Survey tool offers a large range of question types, from multiple choice to rating format, so you can choose the ones that best suit you.

For property professionals, this can be particularly helpful; from one quick survey, you can discover how your customers found their whole experience with you, from the helpfulness of your staff to how satisfied they were with the sales process.

Once the survey has been sent out, you can explore your stats to view the results. At this point, your request for feedback will be welcomed by your customer, so you should be able to gain a holistic insight into trending perceptions of your estate agency. If, for any reason, the customer is less than satisfied with their experience, you can use their feedback to send an apology email containing an offer on their next dealing with you. This small gesture can mitigate a damaging negative review, submitted online for world to see.

# After The Sale

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The event: One month anniversary (home)  
When to send: 1 month after moving  
What to send: Email  
Who to send to: The Customer

This works brilliantly for property professionals or after a significant purchase. Take the opportunity to your customers a happy first anniversary in their new home, and see if there's anything else you can help them with. This will show you care about your customer and view them as an individual, remembering their specific situation. This simple but powerful gesture will also place your brand in the forefront of your customer's mind for when they are looking to sell/move/let again.

The event: Important customer milestone  
When to send: On the day  
What to send: Email or SMS  
Who to send to: Existing customers

The sale is not the end of the journey. Conversely, you'll need to work extra hard in order to maintain your customer's loyalty. This means offers and gentle upselling- but most of all, making your customer feel valued.

Your data is your ally. It can help you discover important milestones in your customers' lives.

For example, as you may have had a really quick sign up form, now is the time to ask more pressing question such as 'when is your birthday?', or 'what's your preferred form of communication'?

Imagine being able to wish your customer a happy birthday, and giving them a gift in the form of a special offer or discount on their future viewing/valuation. These occasions can be a great opportunity to upsell and make them feel personally special to you.

# Retention & Advocacy

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The event:	Exclusive event (e.g. auction)
When to send:	1 month before
What to send:	Direct Mail
Who to send to:	VIPs

At this stage, you should have a holistic view of your customer base, from dedicated readers to those who are backsliding. The key is tailoring your cross-selling, upselling and general communication to these groups. Customisation and segmentation is key here. For those who are backsliding, you may want to consider sending a 'Have You Sold Your House Yet?' email and a small offer on your services in order to regain their interest.

Consistent communication is vital to transforming a customer to an advocate of your brand. With BriefYourMarket.com, you can remind customers about your agency's newest services, or reward regular readers with information on an exclusive future property event. Encourage reviews and testimonials through smart content that arrives at exactly the right time.

With BriefYourMarket.com, the possibilities are sky high, and they're all at your fingertips.

# Retention & Advocacy

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The event:	“Tell us your preferences”
When to send:	1 month after stay
What to send:	Email
Who to send to:	All customers

Craft even more relevant messages by asking your customers what they're interested in. This way, you can reduce unsubscribes by only sending content that your customer wants to hear about. Whether it's mortgages, your deals on the hottest properties or your guides on finding the right home, you can tailor your communication so that you provide only the most relevant information.

With 64% of customers unsubscribing from mailing lists because they don't feel the content is relevant to them, your customers will thank you for taking the time to find out, first-hand, what they're actually interested in- and what they don't want to hear about.

# Retention & Advocacy

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The event:

The data cleanse

When to do it

Following consistently low response rates/customer disengagement

Who:

Unengaged subscribers

Your mailing list needs to be kept as exclusive as a top VIP club. You may be keen to grow subscribers, but as with any marketing activity, you want long relationships that provide excellent returns, you need to target the right people, provide content that is relevant to them and really show value. This analysis may bring a smaller group of recipients – but the alternative – batch and blast, spray and pray – these techniques will only result in a signal to ISP's that your list is not active and engaged with you. BriefYourMarket.com is different in that you can send unlimited emails – but you still have to ensure that you are sending to the right people.

Performing a data cleanse is a good idea if your response rate isn't what it used to be and many of your customers have disengaged from your communications. You'll want to start by seeing how many customer relationships you can rekindle by asking them if they're still interested and also including a preference tool in your email. This may need to be sent a couple of times, depending on how long this list has been unengaged.

For those who have accepted and opted back in, you can then get on board with targeted emails and a real plan for making these enticing and exciting. The opted back in customers need to be treated with great care, so this is an ideal time to offer them a discount or a deal on future viewings or consultations.

For the subscribers who didn't respond, even after a few tries – you need to file them. We suggest a list that you do not send to regularly, but don't unsubscribe or delete them, just park them onto an automated trigger path that will connect with them again after 3 months and 6 months, again, asking them to re-opt in. If the 6 month deadline does not generate further results, it's time to delete this disengaged list.

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# Get In Touch

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If you enjoyed this guide why not get in touch?

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