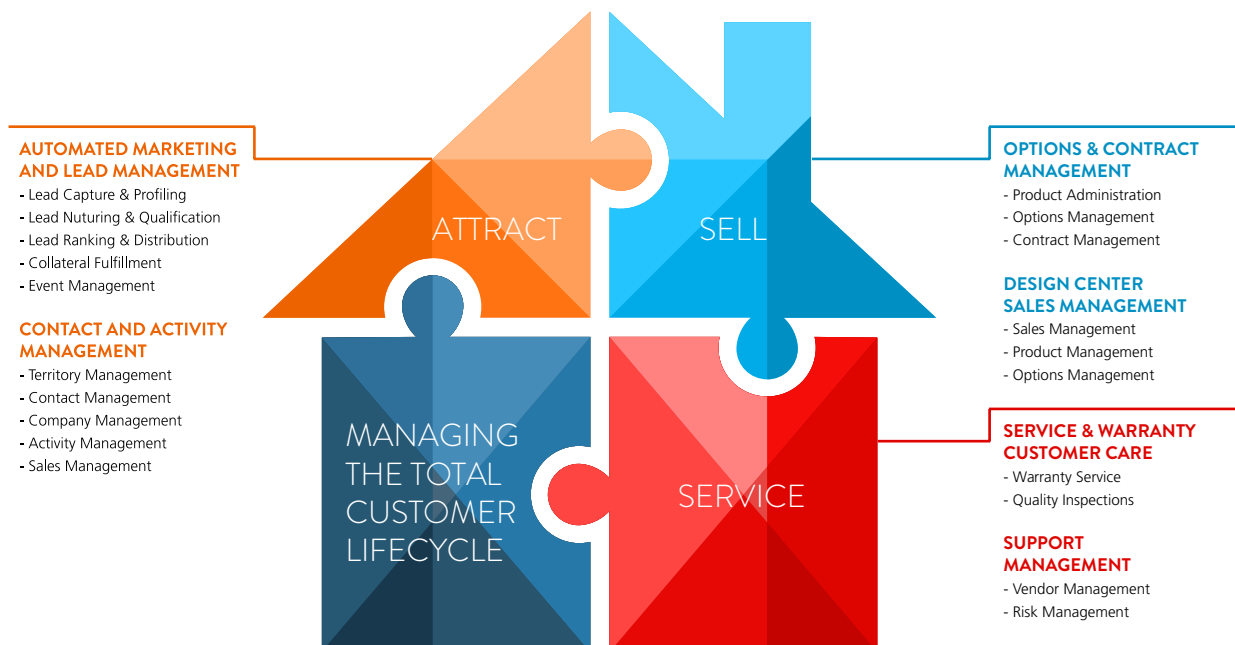


# PIVOTAL CRM FOR HOMEBUILDERS AND REAL ESTATE

## DATA SHEET

Modern home buyers demand confidence with their choice of builder. Confidence that has to be built and developed throughout the entire buying experience. A critical part of this process is helping buyers turn bricks and mortar, carpet and countertops into their dream homes. In order to deliver on these dreams as specified and on time, sales agents need a toolset just as accurate, capable and powerful as the one used by a modern construction crew. Customers need to be happy with not only the initial quality of their home but also with the speed and quality of customer care. Long-term customer loyalty, repeat sales and a strong referral base come from delighting customers throughout their entire lifecycle.



Pivotal CRM for Home Builders and Real Estate delivers capabilities tailored to homebuilders for managing customers from the initial prospect stage through to post sales and future sales. This includes:

- Marketing and lead management
- Design center sales management
- Contact and activity management
- Options & contract management
- Service & warranty customer care

# ATTRACT & SELL: SALES AND MARKETING

Pivotal CRM for Home Builders and Real Estate is a tool that helps to attract new customers, capture and foster leads and build strong and lasting customer relationships.

From the moment prospects walk into a Presentation Center, their demographics, household information and home preferences can easily be captured using a tablet device. This information is critical in helping the sales team to qualify and rank leads effectively.

JOHN SMITH			
<b>TELL US ABOUT YOURSELF</b>			
TITLE	FIRST NAME *	LAST NAME *	
Mr.	John	Smith	
<b>COMMUNICATION PREFERENCES</b>			
PREFERRED CONTACT METHOD *		MARKETING PROJECT *	
Home Phone		Direct Mail	
<b>COMMUNICATION</b>			
EMAIL	ADDRESS	CITY	
test@testing.ca			
HOME PHONE	ADDRESS LINE 2	STATE	
(514) 777-8574			
WORK PHONE	ADDRESS LINE 3	COUNTRY	
CELL	ZIP	COUNTRY/REGION	
(514) 888-9999			
FAX	AREA CODE		
	514		
<b>HOUSEHOLD CURRENT</b>			
OWNERSHIP	TOTAL HOUSEHOLD INCOME	DO YOU NEED TO SELL YOUR HOME?	
<b>DESIRED</b>			
NEIGHBORHOOD *	HOME TYPE	MINIMUM BEDROOMS	
Apachee Woods (Wellington)			
MINIMUM BATHROOMS	MINIMUM GARAGE	DESIRED MOVE IN DATE	
DESIRED SQUARE FOOTAGE	DESIRED MONTHLY PAYMENT	DESIRED PRICE RANGE	
NUMBER LIVING AREAS			

Pivotal CRM for Home Builders and Real Estate makes quoting options and contract management easy. The quote creation process can be configured to include or exclude options within standardized rules to ensure accuracy and consistency across the organization. Any changes are easily captured and added to the terms of the contract. Even complex contract structures can be accommodated – leveraging automation to reduce errors and to prevent delays in closing. All the information that goes into a contract is stored in one central location, from basic facts like home location and model, right down to specific details about light fixtures and windows.

Pivotal CRM seamlessly integrates with powerful design center tools to provide an easy way for customers to build their dream homes. This enterprise-wide design and configuration process reduces the time and effort needed to finalize a home sale.

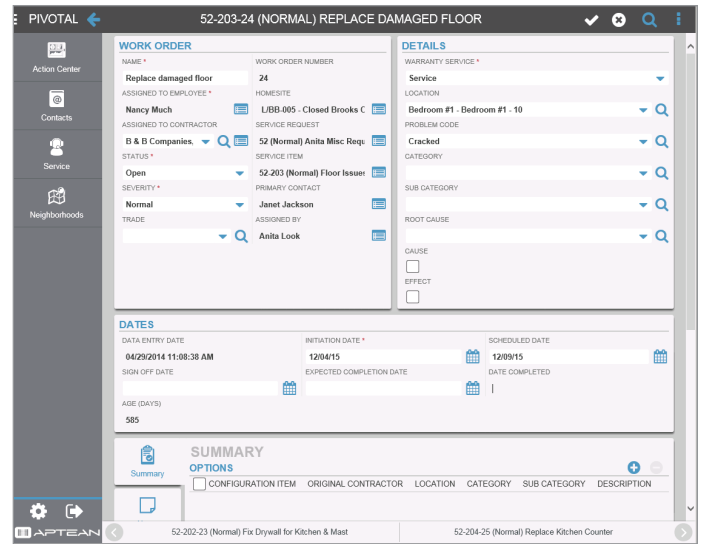
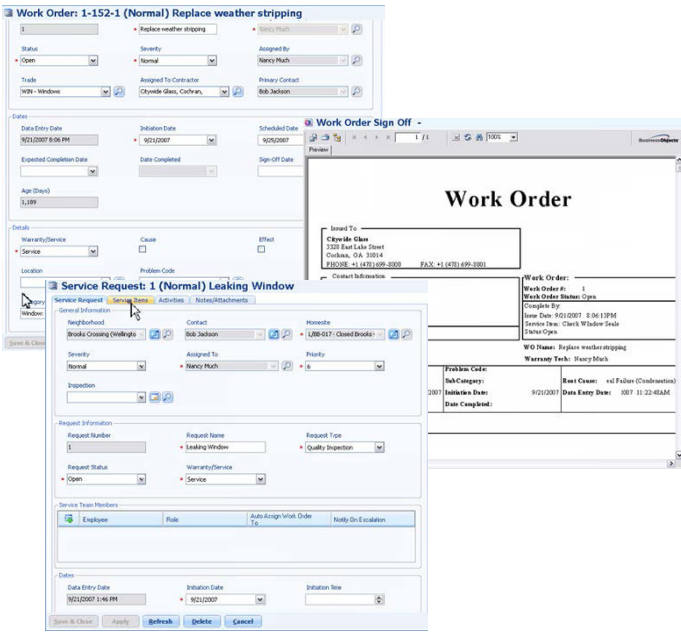
Clients are always kept “in the loop” receiving personalized communications which are all stored within the system. Pivotal CRM for Home Builders and Real Estate ensures that customer information, designs, suppliers and contracts are available to all departments and divisions. This integration provides visibility into all aspects of the business leading to better information sharing and planning.

The screenshot displays the 'Quote: don file: L/CM-002 - Sold Mill Creek Townhomes' window. It features a sidebar with navigation options like 'Sales Dashboard', 'Contact Center Search', and 'My Quotes'. The main area contains a 'Create New' dropdown menu and a 'Quote' section with fields for 'Neighborhood', 'Plan Name', 'Home Site', 'Elevation', 'Price', and 'Total Project Cost'. A table at the bottom lists items with columns for 'Option Name', 'Code', 'Category', 'Unit Price', 'Quantity', 'Extended Price', 'Job', 'Base Prod Cost', 'Option Added On', 'Option Selected Date', and 'Max'.

# SERVICE: CARING FOR CUSTOMERS AFTER THE SALE

Pivotal CRM for Home Builders and Real Estate provides a powerful set of tools for managing long-term customer care. Since all of the option and configuration information is maintained in the system, customer problems can quickly be dispatched or traced back to the appropriate vendor or subcontractor for a warranty claim. Work orders can be assigned to an internal customer care supervisor or directly to an external contractor to ensure timely action on homeowner reported issues. In addition to tracking vendors, inspections and warranty service, Pivotal CRM also tracks customer feedback to provide insight on customer satisfaction.

The Pivotal CRM for Home Building and Real Estate Customer Care Suite provides a service-request tracking process that includes audit trails, cause-and-effect tracking, subcontractor charge-back, and more. Home builders can track after-sale home performance and gain insight into the source of defects through root-cause-analysis reports. Sharing the same centralized data source across the organization for sales, marketing, and customer care information leads to faster problem-solving and a 360-degree view of the customer.

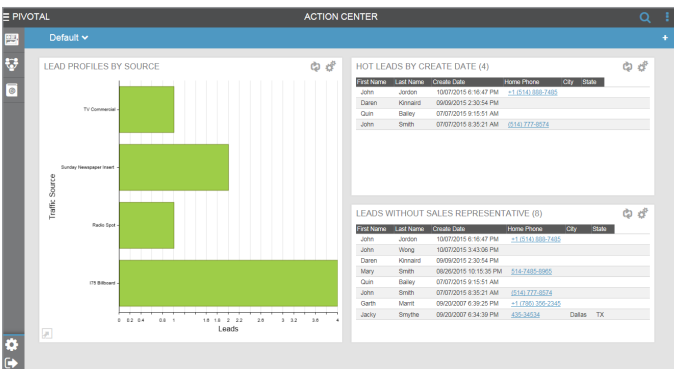


Using the UX client, the warranty team can perform all of their tasks from the mobile device of their choice. They can see their scheduled appointments for the day, review service requests, open work orders and get immediate access to inspection results. Mobile access means that Field Service representatives have the information they need with them at all times and can take immediate action.

## FLEXIBLE

The Pivotal CRM for Home Builders and Real Estate provides a rich set of out of the box capabilities to manage relationships with homeowners from start to finish. The solution also provides tools to configure the user interface and add custom logic to ensure that the application does exactly what you want it to do.

Aptean's solutions are supported by a global development and professional services organizations and are used by the nation's leading builders to manage their enterprise home sales operations.



## CONCLUSION

Pivotal CRM for Home Builders and Real Estate gives you all the tools you need to manage the various relationships you foster when building and selling homes. And because the solution is built on top of the Pivotal platform, it is flexible and can evolve as your business needs change.

Interested in learning more about Pivotal CRM for Home Builders and Real Estate? Please contact us at [info@aptean.com](mailto:info@aptean.com).

## Pivotal for Home Builders and Real Estate - Features & Descriptions

	DESCRIPTION	
<b>Sales &amp; Marketing</b>	Homesite and Home Inventory	Track and display all inventory information, including community, homesite, plan, elevation, options, and pricing.
	Centralized Contract Management	Create contract and addendum documents containing all the pertinent information with a single click.
	Home Configuration and Quoting	Quotes can be easily created from Leads or Prospect with full access to Options configuration. Manage contracts and contingencies directly through to the buyer's signature.
	Contract-Approval Workflow	Implement structured workflows to obtain approval for proposed contracts prior to presenting to the customer. View up-to-date contract status at any time.
	Geographic Administration	Configure divisional and community level business rules and designate contacts for Sales, Services & Warranty team for different divisional workflow.
	Homesite/Options Administration	Maintain plan, homesite, and option data according to effective date. Categorize products based on their type, such as homesite, plan, structural option, or design center option.
	<b>Customer Service</b>	Service and Warranty Information
Service-Request Management		Organize and maintain service requests by different statuses. Create service requests that are associated with either the Homesite or the home owner. Track activities performed against a service request and link service requests to multiple work orders.
Home Inspections		Define customized home inspection templates for quick creation of new inspections for a homesite. Track and maintain inspection reports.
Work-Order Management		Create work orders that support single-family and multi-family dwellings. Create activity steps from work orders and link any pictures or attachments to a Work Order.
Dispatch Options		Assign service representatives and subcontractors to outstanding items and schedule appointment dates. Automatically assign and route service requests based on community and severity (including emergencies). Override service-request routing and assignment manually when necessary.
Service-Request Analysis		Analyze service requests and work orders by performing root-cause analysis, cause-effect analysis, trend analysis, and more.



Aptean is a leading provider of industry-focused mission critical enterprise software solutions. We build and acquire solutions to support the evolving operational needs of our customers. Our solutions help nearly 5,000 organizations stay at the forefront of their industries by enabling them to operate more efficiently, thereby ensuring higher customer satisfaction.

For more information, visit [www.aptean.com](http://www.aptean.com).