

How a Home Remodeling Company Used the Lumin.ai Sales Accelerator to Set 100+/Month More Estin via Fully Automated Texting to Set 100+/Month More Estimates



NEXT Door & Window: Topnotch Products and Customer Experience

Justin Bartley, CEO of NEXT Door & Window (NDW), runs a business that has thrived under family management for 22 years, providing high-end window and door replacements throughout the Chicago and Madison markets. Known for VIP customer service and devotion to a positive and trusting customer relationship, NDW recently earned the Better Business Bureau's Torch Award for Ethics.

They vigorously employ technology to provide topnotch home-improvement results, through their exclusive relationships with manufacturers and fastidious attention to full-frame installations, achieving a perfect color match thanks to their paint and stain facility. Likewise, they focus on a superlative customer experience by selecting best-of-breed software in areas such as AI-based lead scoring by a third party.

Their call center, the Customer Experience Relationship Team (CERT), is a particular source of pride. It places tens of thousands of calls per year, six days a week, following up on each electronic lead in an average of two minutes.

We are unique in our industry because when we assign a lead to one of our 25 reps, that rep keeps the homeowner relationship for potentially years.

—Justin Bartley, Co-Founder & CEO

Opportunity: Maximize ROI for web inquiries

Armed with stunning reviews, strong repeat/referral business making up half their volume, and a successful cornucopia of traditional lead-generation methods, NDW set out to expand their reach by growing their use of digital leads. They focused mainly on traffic to their own website as opposed to lead aggregators.

Phil Odell, Director of Marketing, with his considerable experience in digital lead generation, knew that a strategic approach to this effort would present new opportunities to improve both homeowner experience and NDW's operational efficiency.

1) Speed to meet. Being the first provider to establish a human relationship is paramount, especially without the advantages of a warm referral: online shoppers would vigorously search for competing brands.

Strategy: Automate and coordinate

Matt Slowiak, who leads information technology, proactively innovates to deepen NDW's leadership in customer experience. Responsiveness is a top priority.

Matt recognized that a combination of voice and text messaging would become table stakes for communicating with homeowners, and that the texting would need to be fully automated. Most people contact us because they have an issue with their windows: air infiltration, rot, water, cold, etc. They're usually in a hurry. We've been extremely successful because our follow-up is so good.

-Matt Slowiak, Director of IT

- ▶ Voice is powerful, and a sweet spot for the CERT during the day. But outbound voice is challenging because one never knows when the homeowner can conveniently answer, and all voice calling is hamstrung on evenings and weekends by both propriety and staffing.
- ▶ Texting adds 24/7 convenience, but only if fully automatic. NDW had experimented earlier with semi-automatic texting, which would follow up instantly on lead-form submissions but depend on human agents for subsequent replies. Prospects found this to be slow because of having to wait for an agent, yet annoyingly chatty at other times. They complained.

The supreme importance of coordination was the other key priority. NDW had to abandon an early trial with a different system, because it was blind to the CERT. The integration would need to go beyond merely forwarding leads and issuing appointment notifications. To ensure a seamless homeowner experience, the CERT and the new system would have to be aware of each other in real time.

Solution: Automated Al-driven follow-up

NEXT Door and Window arranged for digital leads to be entered automatically into their customer-relationship management (CRM) system, improveit 360, via its eLead integration, and for improveit 360 to trigger the Lumin.ai Sales Accelerator (SA) in real time upon lead arrival.

Engaging the prospect. A homeowner who fills in a lead form immediately receives a text introducing NDW and offering to find time for a no-pressure visit to assess the project. Many schedule a visit within minutes. Others do not respond immediately. These receive nudges, always at "golden times".

The Results

Based on six months of data tracking the progress of lead submissions from the NDW website, the team compared actual statistics with their business goals.

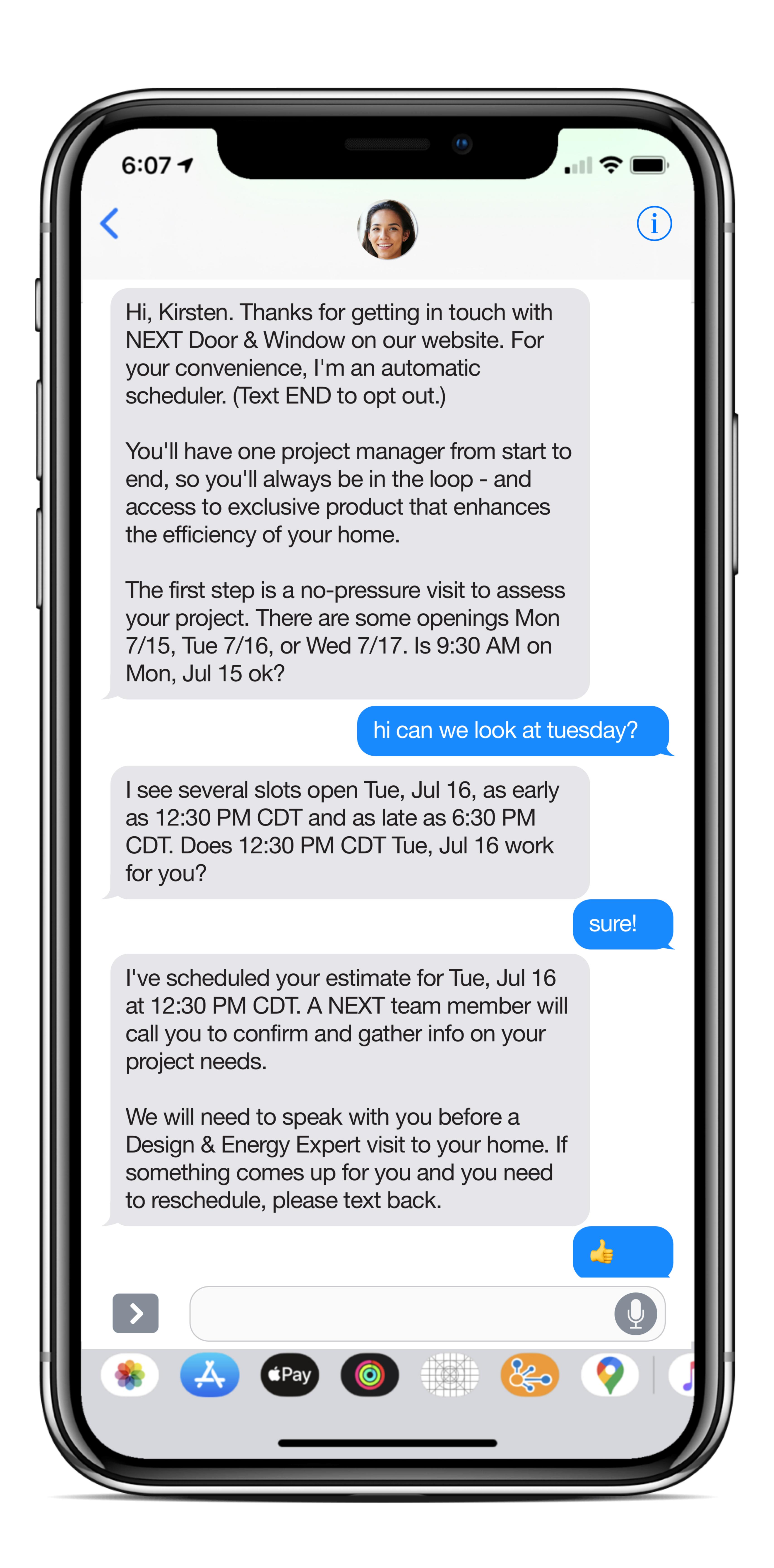
Customer Experience

NEXT Door and Window culturally sees communication as supremely important, and describes the customer journey as the NEXT Level Experience. To their satisfaction, they received none of the homeowner complaints that they'd experienced with the previous semi-automatic texting system.

Conversion and Homeowner Choice

Sales Accelerator drove robust lead-to-appointment conversion. It worked hand in hand with the CERT, allowing homeowners to respond to text or voice calls as they saw fit.

- ▶ During CERT hours, 38.7% of website leads chose to book with SA via text. Another 14.5% chose to book with the CERT via voice.
- ▶ Off hours, 39.3% of the website leads chose to book with SA: propensity to text did not change much on nights and weekends. By contrast, 8.6% chose to book later with the CERT via voice.



Lead to Appointment Conversion Time of lead arrival CERT hours

Freeing Human Agents

Based on the statistics above, the ratio of text to voice was 2.68X during office hours, and 4.56X for leads arriving outside of office hours.

Thus, with help from Sales Accelerator, human agents in the CERT were able to focus their valuable time on a host of other responsibilities, including follow-ups with leads not sent to SA: repeat customers,

Speed to Meet

Sales Accelerator served dual goals:

- ▶ It enabled NDW to have the first handshake among competitors.
- ► It reduced the odds that an intervening change in family plans would cause a cancellation.

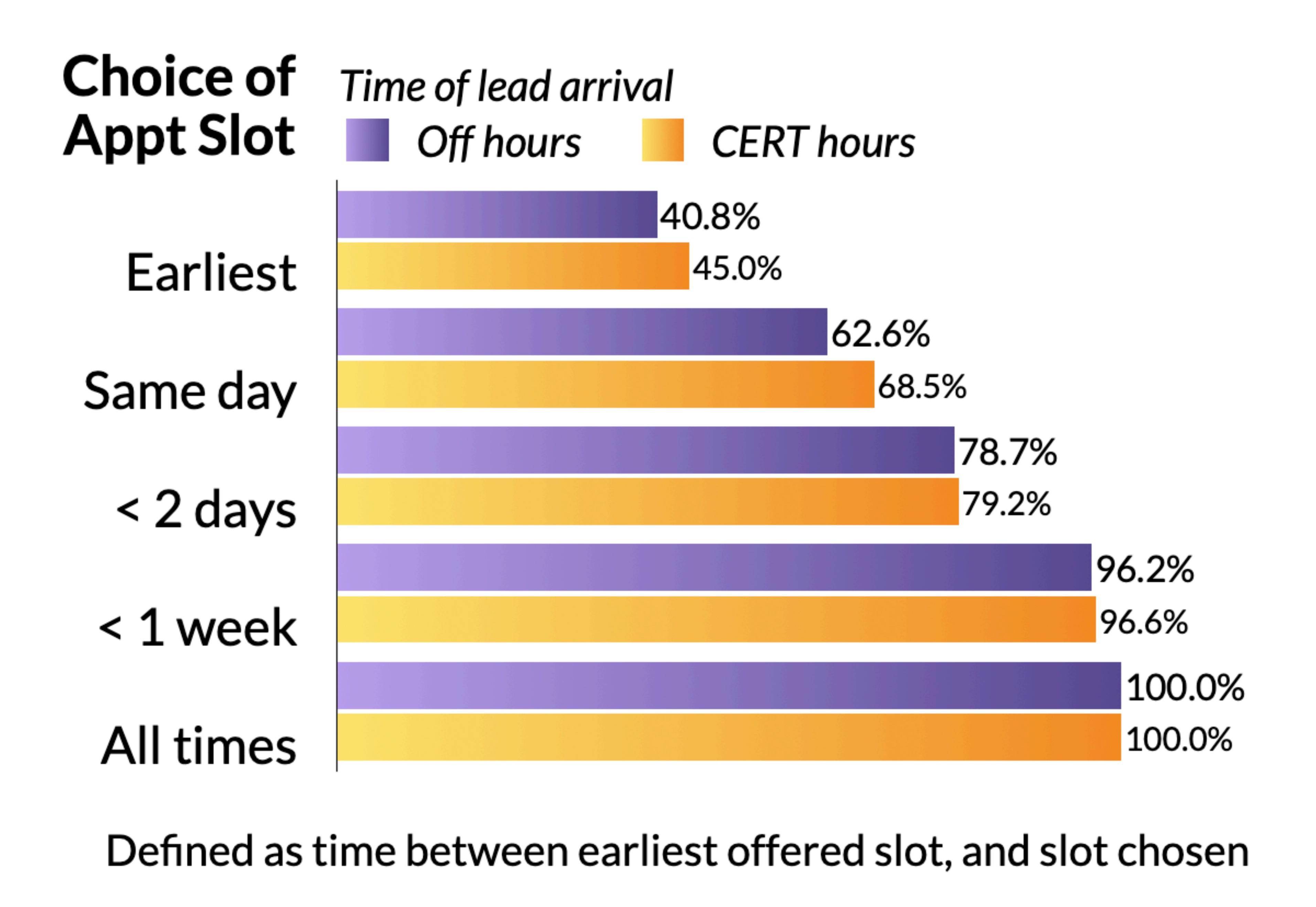
To measure homeowners' willingness or ability to meet soon, the team found that for appointments with leads who submitted during office hours, 68.5% chose a slot or the earliest day available.

Sales Accelerator helps our prospect choose how to make an appointment. Many are simply too busy to take the time for a phone call.

It also lets them coordinate an appointment at a time that's convenient for them. For many of them, that's outside of regular working hours.

-Phil Odell

Most importantly, this shows that for a large fraction of SA bookings, an NDW representative was already in the home by the time competitors' agents were even able to call.



Cancellations

The topic of cancellations brought back a question aired prior to implementing Sales Accelerator: Would the ease of booking via text somehow lead to appointments that do not "stick"?

On the contrary, six months of appointments made by website leads showed that any difference in cancellation rates is negligible: 16% for voice, and 17% for texting with SA.

And as Matt Slowiak had succinctly stated: "It's [SA's] job to get our reps in the door. It's their job to close the deal."

Conclusion

Summing up the impact of Sales Accelerator, Phil Odell pointed to the key goals for NEXT Door & Window: reinforcing the goal to deliver excellent service by responding quickly, and letting human agents focus on the few who need the attention. SA helped meet those aims by driving these fundamentals:

▶ A high issue rate adding to the CFRT's nerformance