

The OSC Guide

to Self-Guided
Home Tours

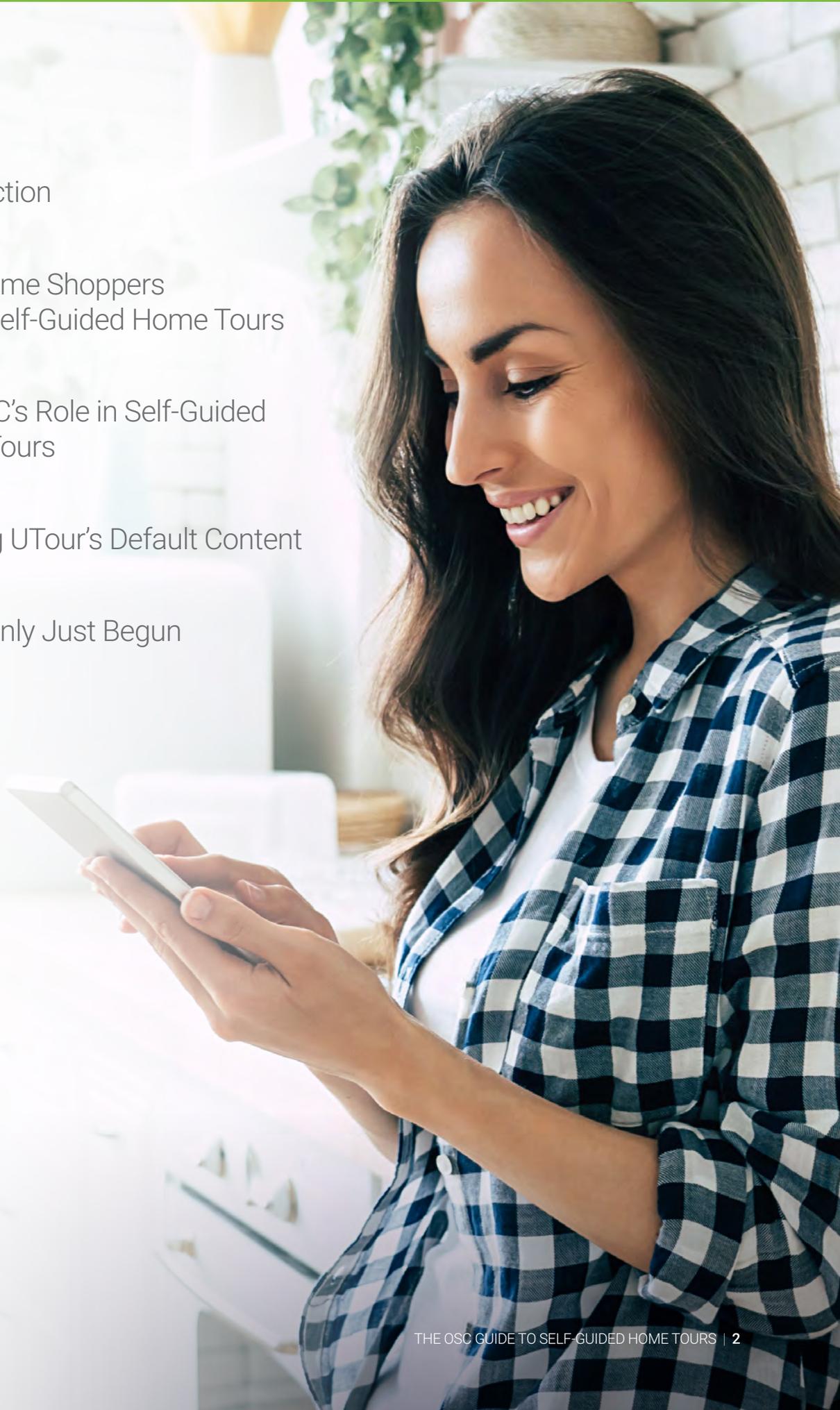
Utour™

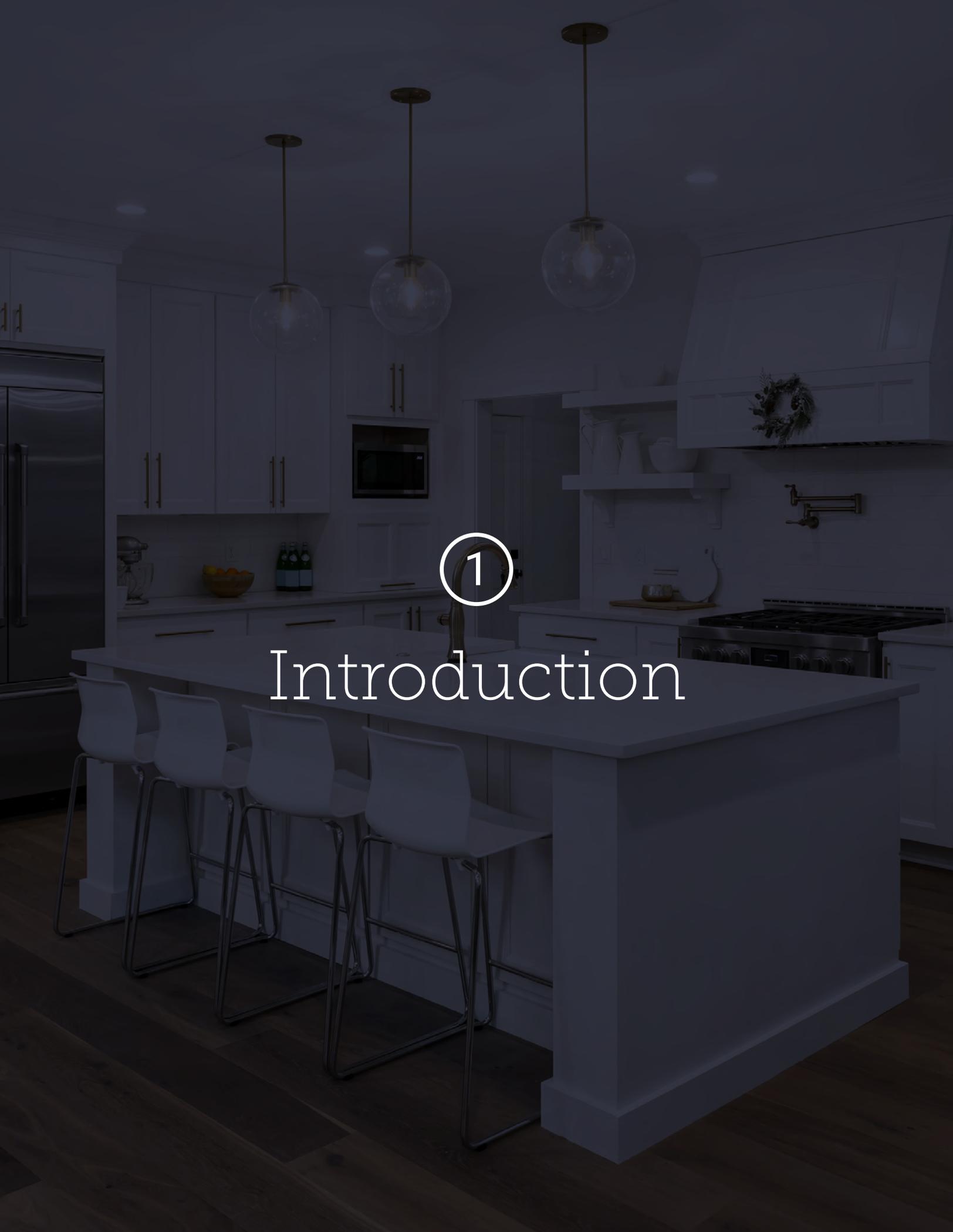
Self-Guided Home Tours



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1

Introduction

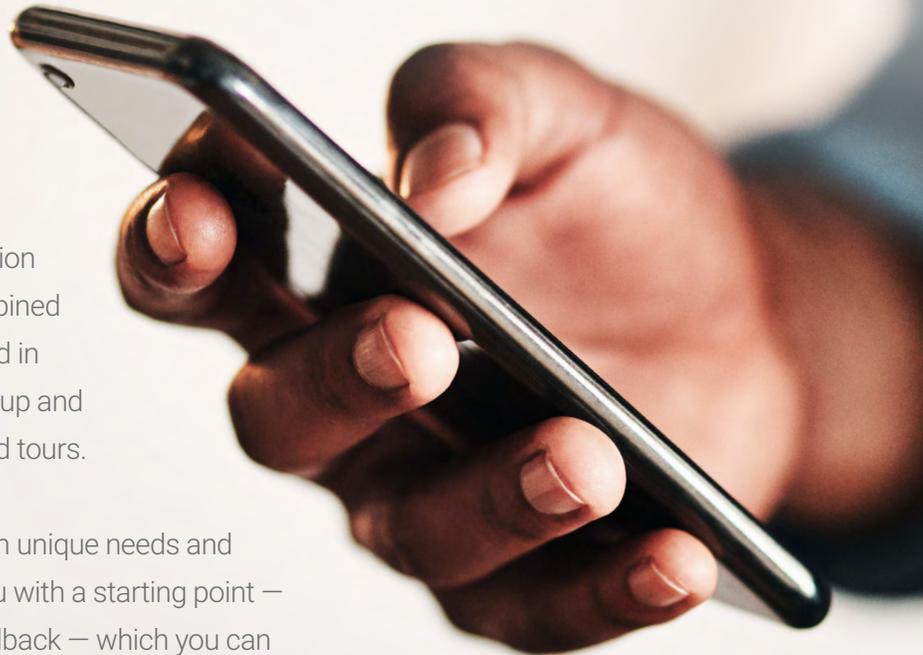
Home buying was already moving towards an on-demand, self-service experience, but when the nation was thrust into social distancing in early 2020, it put the process into hyper-speed.

The industry will never be the same.

Many of the self-service and socially distanced tactics innovated and employed by homebuilders out of necessity during the pandemic are now widely expected and demanded by home shoppers. The home buying process must now be an immersive, digital experience and home shoppers expect to have the ability to gather information on-demand (day or night).

As home shoppers begin to expect and utilize self-guided home tours as a precursor to an appointment with a community salesperson, the Online Sales Specialist (a.k.a. "OSC") must now manage the pre- and post-tour follow-up with this new lead generation channel. However, the UTour platform – combined with our recommended best practices outlined in this guide – will help you deliver timely follow-up and appropriately nurture leads utilizing self-guided tours.

We understand that each builder has their own unique needs and processes; however, this guide will provide you with a starting point – derived from best practices and real-time feedback – which you can then modify and customize to your specific needs.



This guide will help you to:



Define your role in the self-guided tour process



Understand the home shoppers' motives and preferences for self-guided home tours



Utilize our recommended best practices for pre- and post-tour follow-up to home shoppers engaging in self-guided tours



Save time and effort in creating content by utilizing our default content which can be refined and customized to your needs

A man and a woman are standing in a room, looking towards the right. The man is wearing a blue shirt and light-colored pants, and the woman is wearing a grey and black long-sleeved shirt and blue jeans. They appear to be in a home, possibly a living room or dining area, with a chandelier visible in the upper right corner and a fireplace in the background.

②

Why Home Shoppers Prefer Self-Guided Home Tours

While self-guided tours have become widely accepted and utilized by homebuilders in response to the COVID-19 pandemic, the tactic has been used by vacation property and rental property management companies for nearly a decade.

And yes, self-guided tours are also a great solution to social distancing concerns of home shoppers that do want to tour new homes, but are fearful of personal contact. But the demand and motivations of home shoppers for self-guided tours is much deeper.

LATE
2019
PRE-COVID

UTour surveyed home shoppers who registered with a builder digitally (e.g., via their website or an ILS such as NewHomeSource.com, Zillow, etc.) but never actually visited the community in-person. We asked them to explain why they did not personally visit the community, and their responses were:



A majority of new home shoppers surveyed had wanted to visit, but couldn't conform to the standard sales center hours of 10am to 6pm.

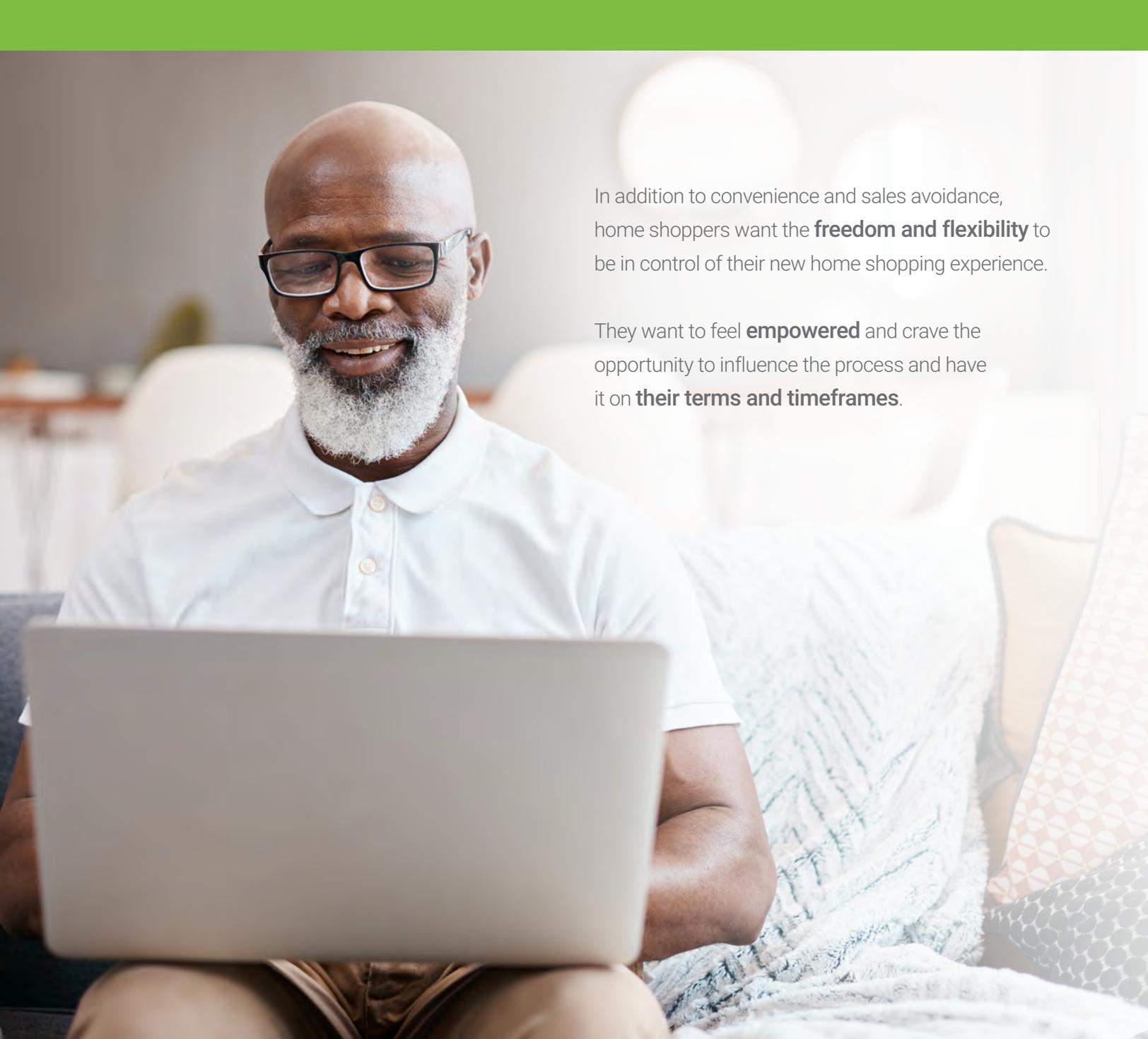


An additional segment of home shoppers stated that they didn't visit because they didn't want to meet with a salesperson immediately.



Most home shoppers prefer to tour homes for sale on their OWN time, without a sales rep or agent.*

*Zillow's New Construction Consumer Housing Trends Report 2020.



In addition to convenience and sales avoidance, home shoppers want the **freedom and flexibility** to be in control of their new home shopping experience.

They want to feel **empowered** and crave the opportunity to influence the process and have it on **their terms and timeframes**.



Your goal, as the Online Sales Specialist (on behalf of your homebuilder), is to be the trusted guide that empowers the home shopper in meeting their desire for self-service, while still managing and nurturing their experience to help them progress through your desired sales funnel.



3

The OSC's Role in Self-Guided Home Tours

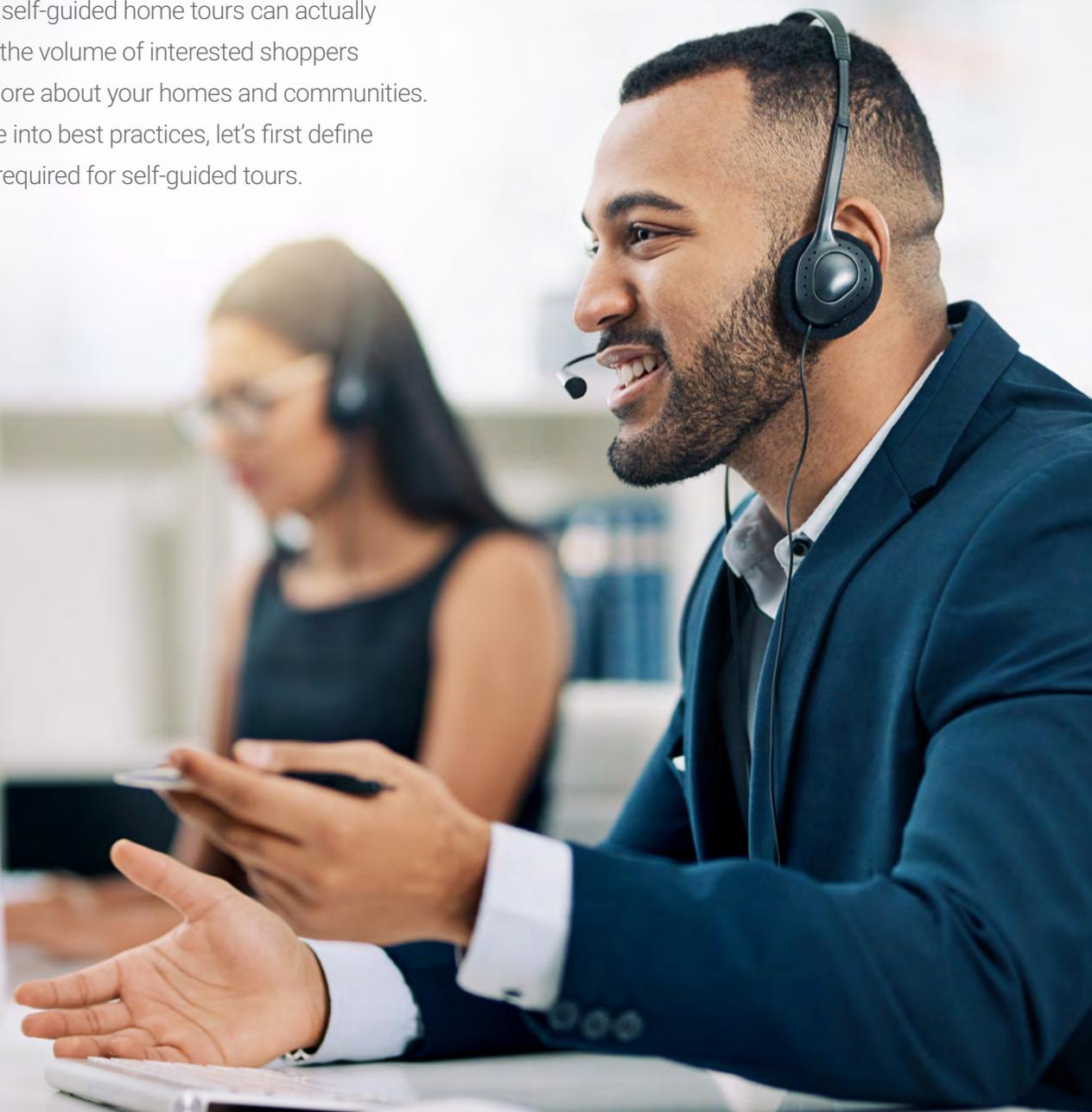
ONLINE
SALES PROGRAMS
CONTRIBUTE OVER

50%

OF TOTAL BUILDER
SALES VOLUME

As the Online Sales Specialist (a.k.a. “OSC”), we understand your critical role in the new home sales process and how vital it is for you to quickly engage with home shoppers to satisfy their needs for immediate information. And, with online sales programs contributing over 50% of total sales volume for homebuilders in 2020, the volume of leads has never been higher.

With that in mind, self-guided home tours can actually help you manage the volume of interested shoppers looking to learn more about your homes and communities. But before we dive into best practices, let’s first define the contact roles required for self-guided tours.



Contact Roles

Via the online scheduling portal, the support contact phone number is displayed in the upper left corner and beneath the Date and Time form fields for desktop users (see Figure 1) and via a “Call Now” callout for mobile users (see Figure 2). This number is displayed for home shoppers to call if they have any questions or technical issues. This contact is a homebuilder contact, but each homebuilder can decide if this role should be filled by the OSC, the on-site sales person or another staff member in Sales or Marketing.

Community Support Contact



This contact serves as the first point of contact for home shoppers as they schedule and self-tour homes. This person will address any questions or issues, which often are simple “user error” occurrences.

Support Callouts via Home Shopper Scheduling Portal (Desktop View)

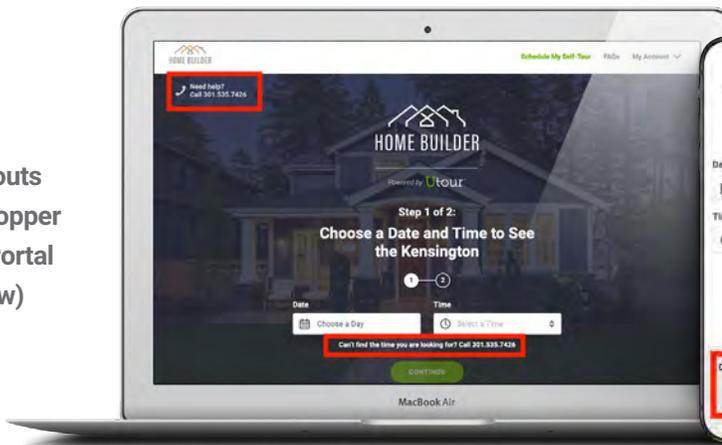


Figure 1

Support Callout via Home Shopper Scheduling Portal (Mobile View)

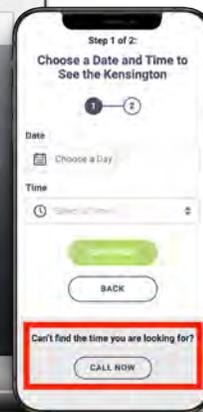


Figure 2



As a resource for this role, we have an online FAQ's section to address many of the questions asked by home shoppers as well as a [Troubleshooting FAQ's One-Sheet](#) to outline best practices for “user error” issues and questions.

Figure 3

The Community Sales Contact’s information is provided to home shoppers once they successfully begin their self-guided tour. Within 5 minutes of arrival, a text message notification is sent to the shopper welcoming them to the community and introducing them to the community salesperson (see Figure 3). If the community has more than one salesperson, the platform will rotate them in a round robin rotation to alternate between the appropriate community salespeople.



**Salesperson Introduction Text
(within 5 minutes of arrival)**



Community Sales Contact

This contact is the community sales representative(s). The UTour platform is able to utilize multiple sales contacts if the community has a team of more than one dedicated salesperson.

OSC as the Community Support Contact

If you are NOT assigned as the Community Support Contact, your role in self-guided tours is limited to post-tour follow-up and lead nurturing (see Post-Tour section on page 8). However, if your company has decided that the Online Sales Specialist should serve as the Community Support Contact, your role is more inclusive in the entire self-guided home tour process.



For a complete visual experience map of the Community Sales Contact’s role, please visit UTourHomes.com/SalesPOV.

Your Role Pre-Tour

As the Community Support Contact, you will receive all inbound phone calls from home shoppers if they have questions during the self-tour scheduling process. Your email address is NOT shown to the home shopper, only your phone number – thus, all support requests will come via a phone call.

To arm you with quick responses to home shopper questions during the self-tour scheduling process, UTour provides the following resources:



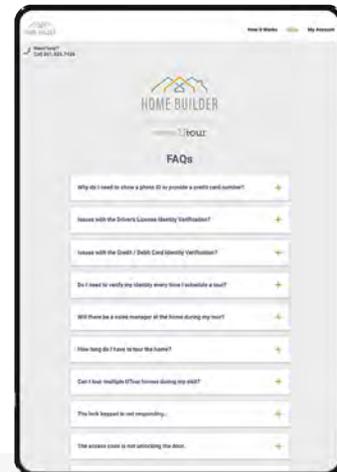
Troubleshooting FAQ's One-Sheet



How to Schedule and Take a Self-Guided Home Tour One-Sheet



Online FAQs



Situational Based FAQs via the Training & Tutorials Section of Your Client Portal

Once you've addressed the questions and issues of the home shopper, and they successfully schedule their self-guided tour, **UTour's automated notifications** will manage the remainder of the transactional communication automatically. The UTour platform is designed to initiate a series of automated notifications — to home shoppers and your internal staff — once specific actions are taken. These notifications ensure everyone is informed, engaged and connected throughout the self-guided tour process.



Self-Tour Scheduled Confirmation

Home shopper successfully schedules tour(s) via UTour scheduling site.



Self-Tour Has Started

Home shopper uses the digital code to access the home triggering this notification to the internal staff.



Self-Tour Date / Time Reminder

Sent 1 hour prior to the tour start time.



Self-Tour Cancellation Confirmation

Home shopper has canceled the tour.



Tour Time Missed / Please Reschedule

After 30 minutes into scheduled tour time the home shopper has NOT accessed the home — and another shopper has scheduled a tour immediately following this shopper's tour time — this notification is sent.



Tour Time Missed / Extend Time Option

After 30 minutes into scheduled tour time the home shopper has NOT accessed the home — and there is NOT a tour currently scheduled after this shopper's tour time — this notification is sent.



For a complete overview of all automated notifications, including the actual default messaging shown to both home shoppers and your internal team, visit UTourHomes.com/Notifications.

You Role During the Tour

Shortly after arriving for their tour, the home shopper will receive a text message, encouraging them to reach out to the sales team during or after their tour, and the salesperson's phone number and email address is provided. This is the official "hand-off" to the community sales team, as all communication during and after the tour is now directed to the community sales staff.



Your Role Post-Tour

At the conclusion of a self-guided tour, the home shopper will receive a text message and two additional emails encouraging them to reach out to the sales team to take the next steps in the homebuying process (visit UTourHomes.com/Notifications for content examples). It is also at this time when UTour will automatically deliver the home shopper information and tour details to the homebuilder's CRM.

UTour integrates with your CRM to deliver the following information at the conclusion of a self-tour:



Visitor Details

The name, email address and phone number of the visitor.



Community

The community name where the home exists that was self-toured.



Self-Tour Date / Time

The scheduled tour visit date and time.



Plan

The home plan name of the self-toured home.



Registration Date / Time

The actual date and time that the self-tour reservation was scheduled.



Home Address

The full address of the self-toured home.



Division

Corresponding builder division associated with the self-toured home (if applicable).



Tour Status

Indicates the outcome of the self-tour as either Missed, Completed or Canceled.

Once the home shopper and tour information are delivered to your CRM, **your role will shift from the Community Support Contact to your Online Sales Specialist (or “OSC”)** role. While each builder has their own unique processes and rules for follow-up engagement, most of our homebuilder clients utilize the following process for post-tour follow-up, which focuses on the Tour Status field.



Tour Status = Missed

The visitor data is treated as an “eLead” (since the visitor did not actually self-tour on-site) and is directed to the OSC’s module within the CRM to trigger the normal lead nurturing processes managed by the OSC for all eLeads.



Tour Status = Canceled

As with “Missed” tours, this status treats the visitor as an eLead since they did not visit the community in person and the data is directed to the OSC’s module within the CRM.



Tour Status = Completed

This represents a completed self-guided tour, which indicates an in-person visit. As such, the visitor is treated as a “walk-in” prospect and transferred to the community sales team module in the CRM. All future follow-up is the responsibility of the sales team.



A close-up, low-angle shot of a person's hands typing on a laptop keyboard. The scene is dimly lit, with a strong blue and purple color cast. The focus is on the hands and the keys, with the background being out of focus.

④

Refining UTour's Default Content

As stated earlier, UTour platform is designed to initiate a series of automated notifications to deliver in response to specific actions taken by a home shopper during various stages of the self-guided tour process.

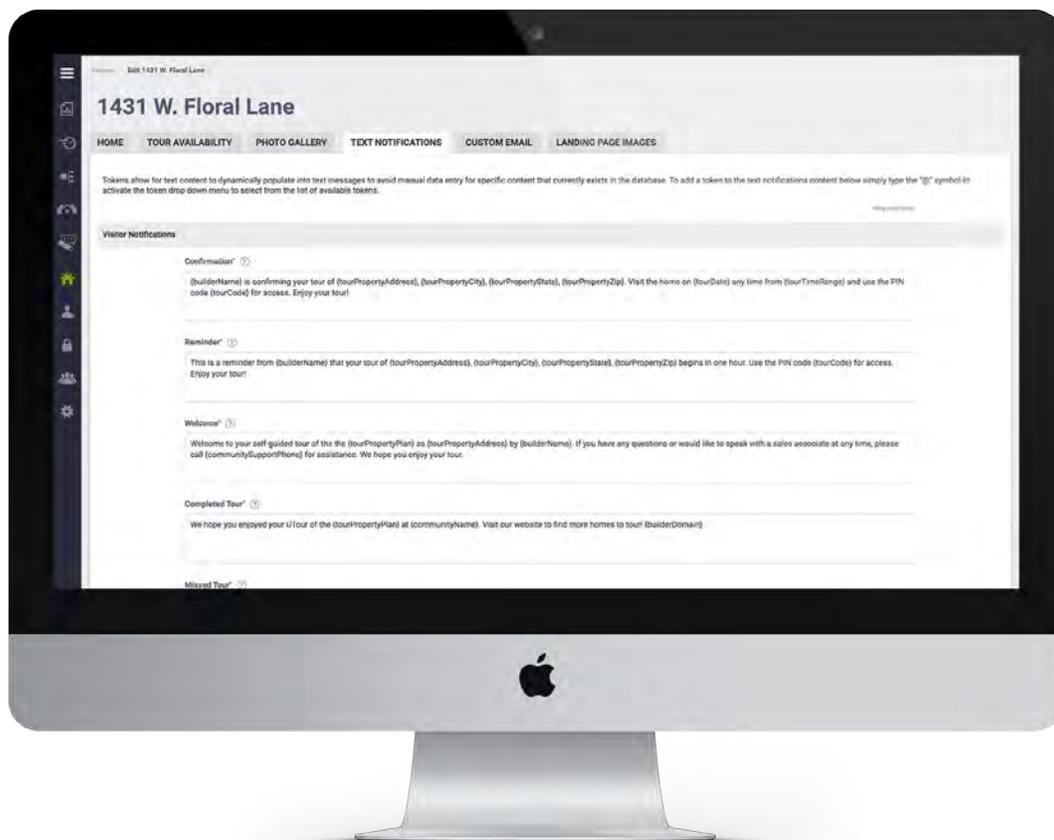
You can access our actual default messaging delivered to home shoppers (and internal notifications sent to your internal team) at UTourHomes.com/Notifications.

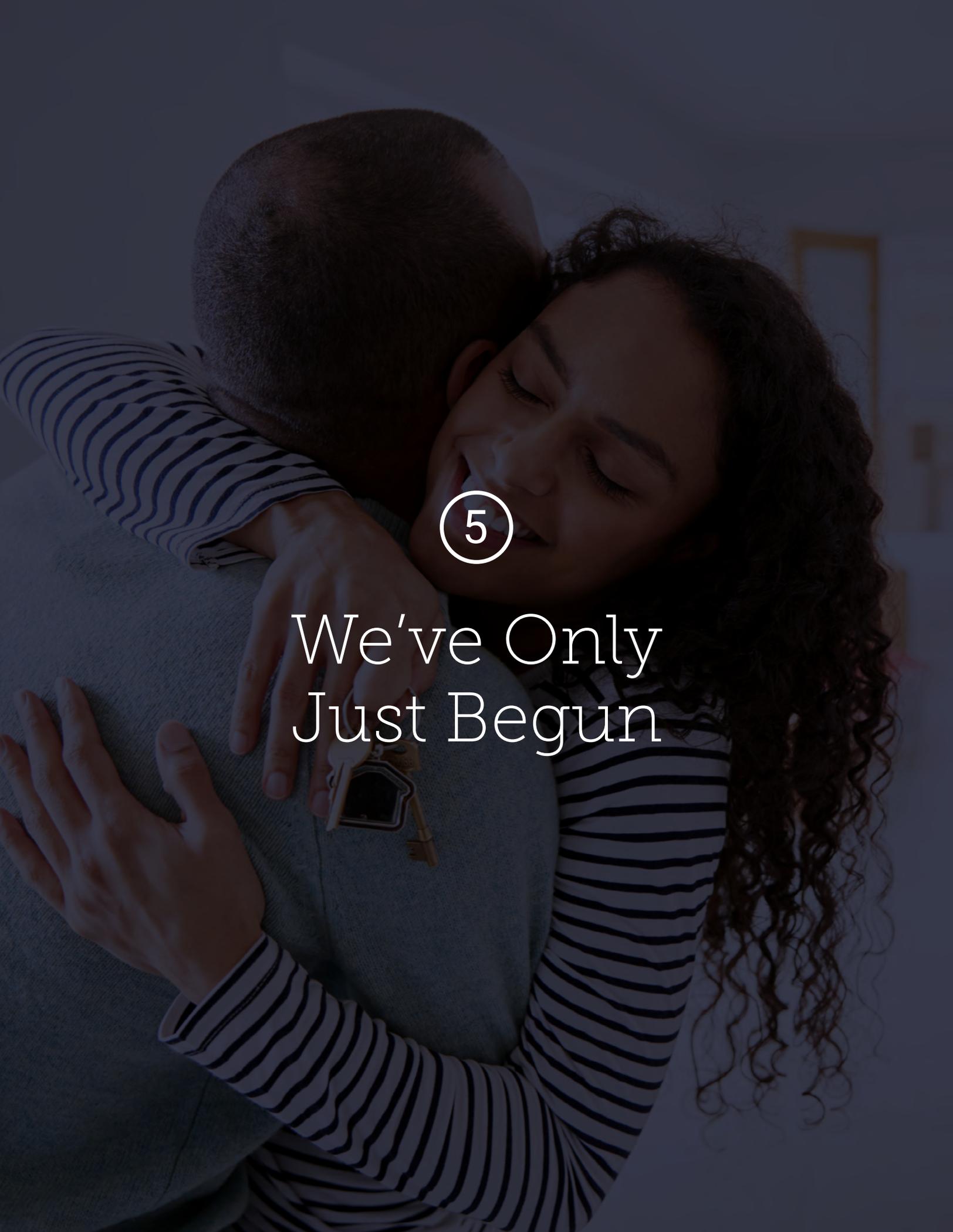
While we have provided default messaging, the UTour platform is designed to allow each homebuilder the ability to customize the messaging for each automated notification as they deem appropriate (see Figure 4). Thus, your ability to modify and customize each message is unlimited, and the UTour platform automatically handles all delivery — saving you time and effort.

UTour's platform was designed to make your life easier by handling all of the self-tour transactional communication automatically and to seamlessly integrate with the current OSC and community sales team follow-up strategies that are part of the overall new home sales process. Yet, we realize each homebuilder has unique and specific processes, hence, our default content is available to you via your UTour Builder Portal to allow you to customize the content to your specific needs.

Figure 4

Automated Notifications Management via the Client Portal



A photograph of a man and a woman embracing. The man is wearing a grey suit jacket with a key on his pocket. The woman is wearing a black and white striped shirt. The image is dimmed with a dark overlay.

5

We've Only
Just Begun

Our goal at UTour is to deliver the home shopper's expectations of an on-demand experience where they feel empowered and in control, while also serving the homebuilder's OSC and community sales teams to provide a scalable and repeatable process that is customer-centric, efficient and effective.

As technologies evolve and adoption increases, we are committed to ensuring our platform evolves to meet the needs of home shoppers and homebuilders alike, helping more prospective home buyers find their dream home AND helping homebuilders by bringing more home shoppers to your door.

We are always looking to learn, grow and improve. If you have any additional suggestions or best practice recommendations you would like to share, we would be grateful for your insight. Simply email us at Info@UTourHomes.com.

We are grateful for your collaboration!





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