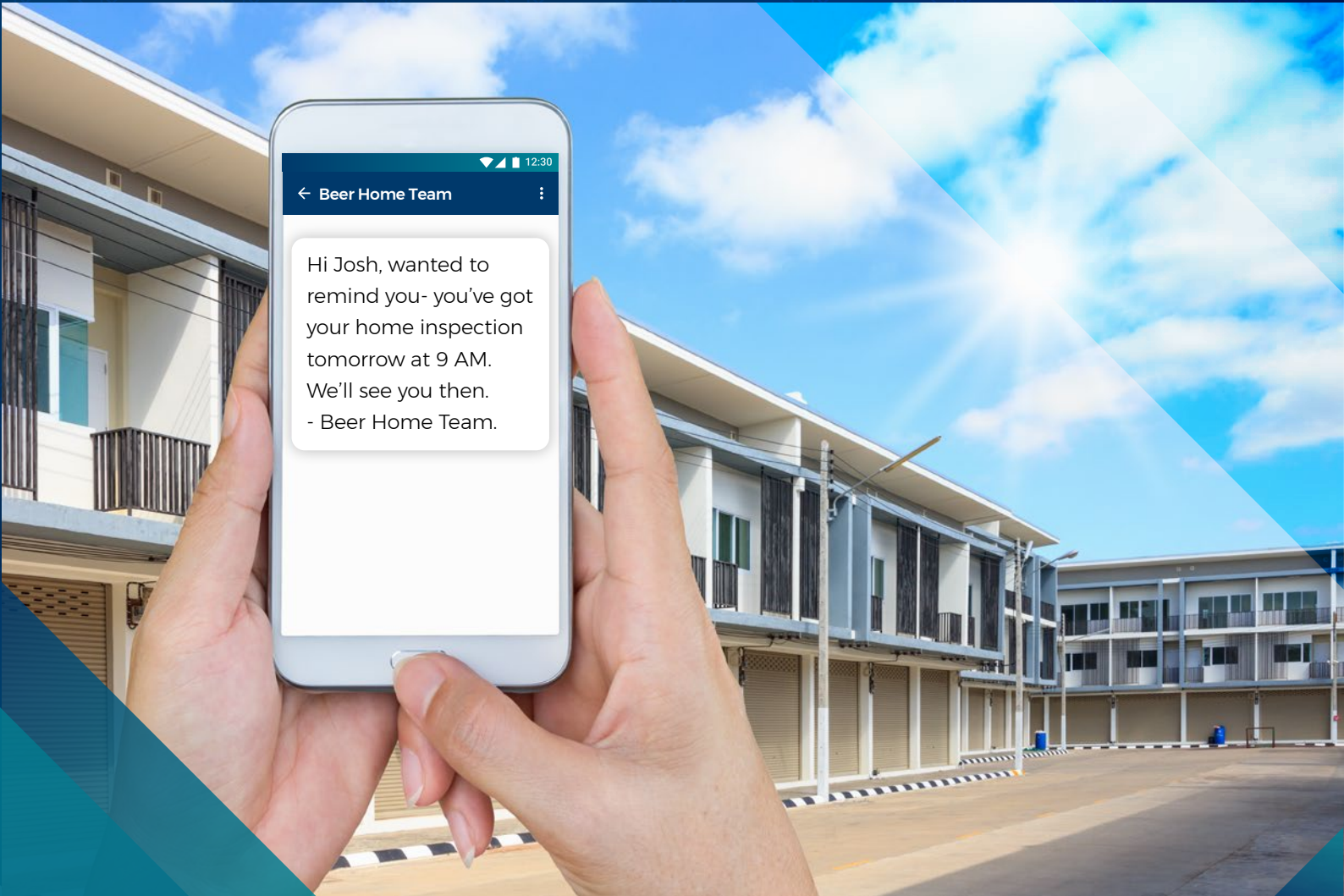


# Beer Home Team Streamlines the Buying and Selling Process with Messaging



Beer Home Team (BHT) uses messaging extensively in sales and operations to converse with customers.



Fifty-five to sixty percent of our customers say that they prefer to be reached by text.



- Laura Branca  
COO, BHT.

## Overview

[Beer Home Team \(BHT\)](#) was the number one real estate team in Southern California when they were with Keller Williams, the largest brokerage in the nation. They have also been recognized as one of the Top 150 teams in the nation per The Wall Street Journal and Real Trends. The company is focused on residential home sales. They list properties for people who want to sell homes and assist potential home buyers in finding a house.

## Business Challenge

The company used calls and emails to reach clients, but they wanted to use a communication method that was in vogue and preferred by the younger clients they were serving. The agency also realized that the real estate industry was leaning toward texting.

In the real estate mastermind group meetings that BHT attended, the company discovered that other real estate agents were using text messaging. The team also wanted a quick communication channel, so texting fit the bill.

Client conversations also confirmed that text messaging was a preference as a communication option. However, the admin team was reluctant to text clients from their personal phone numbers. This led them to look for a solution that would enable them to send messages from their CRM.

## Answering the Challenge

BHT uses Salesforce as their CRM. In fact, they did a custom build-out of Salesforce specific to residential real estate that they now make available to teams across the country. They searched on the AppExchange for texting solutions. They wanted a solution which would integrate seamlessly with Salesforce, was fairly priced, and had a strong customer support team who could help them set up automated text messaging.

The company did a great deal of research and spoke to many people, including their Salesforce AE. They visited websites of solutions on their shortlist and decided to go with SMS-Magic, as it met their criteria.

"SMS-Magic was the most recommended application for texting for Salesforce," says Laura.

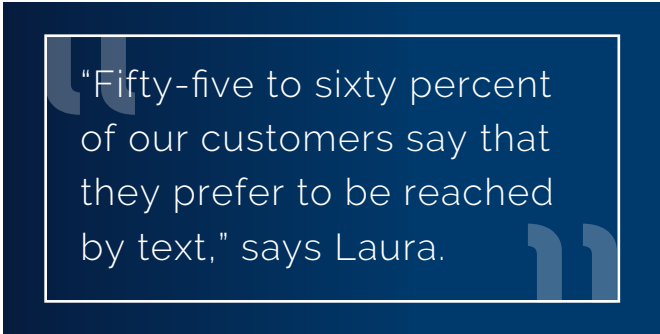
## How BHT Uses Messaging with Buyers and Sellers

The agency uses text messaging throughout the lead and customer life cycle, to constantly communicate with them about what's happening with their house sale or house hunt. "We use texting all the time," says Laura.

### Messaging Leads

BHT gets leads from a variety of sources, including website forms, industry websites like Zillow and Trulia, and other referral and lead generation programs. The team starts using texting right from the time a lead is created in their CRM. An inside sales rep calls and texts the lead. Messaging helps them check whether the phone number they have is valid.

Next, they ask a new seller or buyer whether they'd like communication by email, phone or text message. "Fifty-five to sixty percent of our customers say that they prefer to be reached by text," says Laura. In fact, the company found that text messaging was popular across generations.



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An inside sales rep sends customized texts based on whether the lead is a home seller or buyer and uses information in the CRM about the lead to further personalize the messages.

They continue to use texting when the lead is converted into an opportunity, as well as when he or she becomes a customer. Account managers keep the conversation going with the customer, to move closer to the sale or purchase. The conversational history also helps the transactions team to follow up with customers.

## Messaging Customers Using Automation

Once a lead becomes a customer, the agency sets up an automated messaging flow for customers who want to be contacted via text. These messages differ depending on whether the customer is a home buyer or seller.

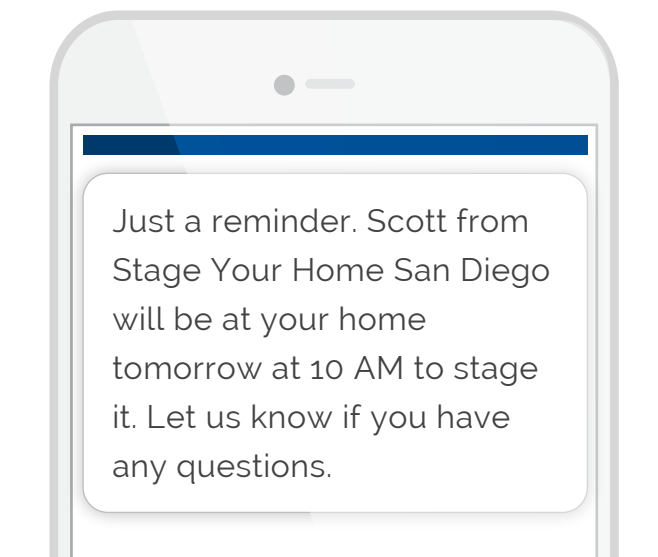
“We have 15-20 automations that go out to our clients who have opted for texting as a communication method; throughout the transaction,” says Laura. The automations are triggered by milestones set up in their CRM.

When a milestone occurs, a quick text goes out to notify the customer in a conversational manner, like 'Hey Great News, this is what just happened.' The company's customers value these messages, because they feel like they're always up-to-date with what's happening with their sale or purchase.

### *For Sellers*

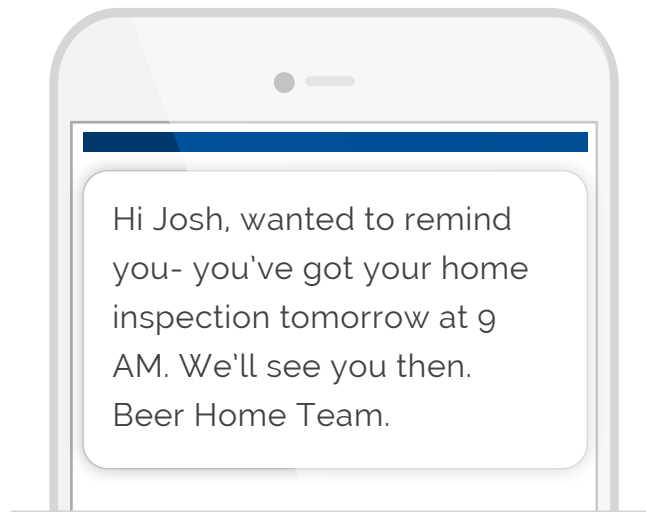
Once the BHT Listing Manager orders the For Sale sign, she checks a box in Salesforce. The customer gets an automated text immediately, saying the agency just ordered the For Sale sign and it will be up in their yard within the next 24-48 hours.

Then when a home is photographed for staging, automated text messages are sent based on the days the house will be photographed and staged. Friendly reminder texts go out to the customer the day before a team member is slated to shoot the photographs or complete the staging, mentioning the team member's name.



## *For Buyers*

If a new listing comes on the market, a team member will send a text message alert about it to a buyer who has shown interest in buying that property type in their preferred location. Buyer text automations kick in once they're under contract. They revolve primarily around reminders. For example, a reminder message goes out the day before the home inspection.



Buyers also get reminders about contingencies. Since there's constant communication at the negotiation stage, the agency primarily uses texts. They also send automated messages when deals are about to close.

BHT runs a post-closing survey to evaluate the customer experience and they usually get high scores. They attribute their high scores to the consistent communication via automated text throughout their relationship with their customers.

## **Messaging Campaigns for Events**

The company organizes workshops, client appreciation events and community events. They set up campaigns for these in Salesforce and link leads to these campaigns. BHT sends messages from campaigns to the leads as event reminders, to increase attendance. Usually one goes out the day before the event and another on the day of the event. A thank you text also goes out to attendees after the event.

## Highlighting the Business Value of Messaging

Regarding the results the agency gained from using texting to communicate with customers, Laura listed these benefits:

**Better customer service.** When asked about messaging's contribution to the superior customer service BHT delivers, Laura pegged it at 25 percent. The company's customers are pleased that they're kept in the know about the progress of their home sale or purchase.

**Higher productivity.** Laura is happy about how texting has enabled her team to be more productive. The admin team which handles the transactions, finds it easy to send a text from the Salesforce record, so they're communicating more with customers. Texting's quicker than picking up the phone or sending an email, so they'd rather message customers when appropriate.

**More two-way conversations.** Once team members build relationships with customers, they send questions about progressing the sale or purchase via text to customers, because they know that increases their chances of getting a prompt reply.

"From a transaction standpoint it's been a game changer for us, because our operations team has a lot of deals they're working on, and the ability to text right from the record so that they've got the history of all the texts pertaining to the record, has been huge. They're raving fans of it. Coupled with texting automation, messaging has increased [our team members'] capacity for how many transactions they can work on at a time by 15 percent," says Laura.

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When we asked about SMS-Magic's new Converse Desktop, Laura said that it had made the team's and her work easier. Laura oversees the operations team's work and when she looks at a transaction's history in Salesforce with the texting history, it's simple for her to get up-to-speed.

Buying or selling a house is a big decision and by continuously communicating with their clients throughout the process via texting, BHT earns and keeps their trust. Text messaging reduces the team's workload, so it's the preferred conversational channel for both agents and customers. Buoyed by their success with messaging, the company plans to increase the ways in which they are using this medium for business.

#### About SMS-Magic

SMS-Magic is a proven, global messaging platform for Salesforce, with over 1500 clients across 59 direct carriers, including small, midsize, and enterprise accounts. SMS-Magic enables Salesforce users to engage buyers and win and retain more new customer revenue, while creating strong customer relationships that drive sustainable competitive advantage. SMS-Magic is the most positively reviewed messaging application on Salesforce AppExchange.



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