

Customer Journey Map: *We Wanted a Place to Retire or Retreat. We Found a New Home.*

BUYING PHASE	Inspiration 2+ Years	Investigation 1+ Years	Comparison & Decision Phase	Contract to Close
BUYER'S GOALS	<p>Access to water, easier lifestyle</p> <p>Serenity, retreat from the city</p> <p>Do I want to move? Do I need to move? Will I have to move?</p> <p>Understand what current house is worth, so they can understand their options</p> <p>Understand what's out there</p>	<p>Understand what new home prices are now</p> <p>Nail down how much do I want to spend?</p> <p>They are qualifying themselves by going through this exercise</p> <p>Easily find information about options</p> <p>Understand travel time</p>	<p>Travel time</p> <p>Floorplans</p> <p>Amenities</p> <p>Tax rates</p> <p>Church/Healthcare</p> <p>Side-by-side comparison</p> <p>Rental policy</p> <p>Narrow it down to two communities</p> <p>Get all the answers they need to make a decision</p>	<p>Easy process</p> <p>Review paperwork</p> <p>Quick close</p> <p>Updates</p> <p>Acceleration</p> <p>Definitive information</p> <p>Prequalified</p> <p>Financial planning</p>
THINK & FEEL	<p>Purpose and relationship - day in the life</p> <p>I can buy any kind of house, anywhere. I'm unlimited.</p> <p>Curious</p> <p>Don't have to worry about school districts anymore</p> <p>Desire to stay close to kids/grandkids/family/friends</p> <p>Excited!</p> <p>Next Great Adventure!</p>	<p>Realize that it isn't like buying a previously owned house - many more things to consider</p> <p>Figure out their priorities</p> <p>Take information gathering to the next level</p> <p>Still narrowing down geographic regions</p>	<p>Looking at specific amenities. Who has what?</p> <p>Looking at home features, floorplans, customizable, see the aerial view of the community</p> <p>Comparing location: River? Beach? Desert?</p> <p>Excited again!</p> <p>Asking questions</p> <p>Willing to email and ask questions/willing to have that conversation by phone or in person</p>	<p>Committed to new lifestyle at Heritage Harbor</p> <p>Thinking about how this will change their daily/weekly life as it is now</p> <p>Feeling favorably about the new community that they are joining</p>

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BUYER'S EXPECTATIONS	<p>Find information easily</p> <p>Quick and easy online access to information and to get to brochures without having to talk to anyone</p> <p>Don't want to talk to 20 different people to compare my options</p> <p>Want an easy way to do a side-by-side comparison of communities and builders</p>	<p>Low expectations</p> <p>Not looking for brands to help them through this stage</p> <p>Talking to friends and family</p> <p>Willing to email as long as they don't have to talk to someone</p> <p>Expect to get answer in concise way</p> <p>Reassurance</p> <p>Easy process</p> <p>Home options</p> <p>Want us to define the process</p> <p>Want us to inspire and exceed expectations</p> <p>Taxes</p> <p>Resources to help them with this decision</p> <p>Education</p>	<p>Accurate info</p> <p>Reassurance</p> <p>Meet expectations - deliver on brand promise</p> <p>Respect - feel significant</p> <p>Make it easy</p> <p>Pride</p> <p>Having fun</p> <p>Immersive experience</p> <p>Meet people in community; experience community</p> <p>Social connection</p> <p>Expect the agent to get back to them very quickly with answers</p> <p>Responsiveness</p> <p>Find floor plans and virtual tours</p> <p>Understand how they can customize house to make it their home</p>	<p>Option to reserve</p> <p>Recommending lenders</p> <p>Help getting ready to move</p> <p>Updated DCCR</p> <p>Financial options</p> <p>Gifts</p> <p>Help with transition in living arrangements</p> <p>Community relationship</p> <p>High expectation</p>
EMOTIONS	<p>Excited, curious, enthusiastic</p> <p>Inspired by that next great adventure</p> <p>Trepidation. Can I get the money out of my house?</p> <p>Melancholy</p>	<p>Excited, especially if they don't have financial issues</p> <p>Uneasiness about aligning moves between houses</p> <p>Concerned if home will sell and how quickly</p>	<p>Liberated and excited</p> <p>Accepted</p> <p>Compromise</p> <p>Overwhelmed</p> <p>Excited</p> <p>Finality</p>	<p>Anxiety</p> <p>Exhilarated - This could be me!</p> <p>Committed</p>

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EMOTIONS cont'd		<p>When do I need to put my house on the market?</p> <p>How do I align timing of selling my house with buying a new home?</p> <p>Doubt - Can I afford to move? Can I get enough out of my current home to help me with my next move?</p> <p>Overwhelmed</p>	<p>Melancholy</p> <p>Frustrated</p> <p>Not as fearful</p> <p>Motivated</p> <p>Committed</p> <p>Great opportunity</p> <p>Feeling inspired again</p>	
CHANNELS BUYERS USE	<p>Facebook, Instagram, Pinterest</p> <p>Drive by</p> <p>Talk to friends</p> <p>Events, trade shows</p> <p>Organic/paid search (Google and Bing)</p> <p>Community website</p> <p>Directories</p> <p>PR/media</p> <p>Print advertising</p> <p>Direct mail</p> <p>Mobile</p>	<p>Talking to friends/family</p> <p>Community websites</p> <p>Websites for research and information, calculators, QuickenLoans, Veteran's Affairs (VA certificate eligibility)</p> <p>Looking at real estate sites to see what their home might be worth. Zillow, Realtor.com, etc.</p> <p>Tour/Visit to learn more about a handful of communities</p> <p>Social media to learn more about community personalities</p> <p>Emails to receive information</p> <p>Realtor</p>	<p>Tour (often 2nd visit)</p> <p>Detailed plans</p> <p>Family</p> <p>Reviews</p> <p>Testimonials</p> <p>Social media</p> <p>Email</p> <p>Revisiting community website</p> <p>Financial planner - Helps them answer: Does this make sense?</p>	<p>Calls</p> <p>Emails</p> <p>Strong social engagement and content (sharing with friends)</p> <p>Financial planner</p> <p>On-site events</p> <p>Sales support staff</p> <p>Connection with residents</p> <p>Brand ambassadors</p> <p>Activities director</p>

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PROBLEMS	<p>Overwhelmed with where to start</p> <p>How do you start to compare?</p> <p>Picking one location over another, depending on where friends and family live</p> <p>You want to move, but your parents aren't moving - how do you navigate that?</p> <p>Priorities: Lifestyle, amenities</p> <p>How to downsize? It blows your mind! Where to begin.</p> <p>Teetering point of deciding - do I invest in my own home or do I move?</p> <p>Belonging and fitting in - how will I fill my day? Can I find a new social network?</p>	<p>Keep from regressing back to inspiration phase</p> <p>How to overcome horror stories. Everyone hears a story about how they can't sell a house.</p> <p>Potential buyers many not have done any upgrades on their current home, which impacts price and how long to sell a home.</p> <p>Don't know the possibilities or understand their whole financial picture of what their options may be (i.e., reverse mortgage)</p>	<p>Responsiveness from sales side</p> <p>Invest in leads and take them seriously</p> <p>The build time. They are ready to go, but have to wait for home to be built</p> <p>Aligning the moves</p>	<p>Confusing process</p> <p>Overwhelmed with need to interact to finalize the deal</p>
IDEAS & OPPORTUNITIES	<p>Improve visitor experience on website, social media, paid search</p> <p>Explore new topics, for example, downloadable checklist on downsizing</p> <p>Consistency on messaging across print ad, phone call, digital ad, etc.</p>	<p>Educate potential buyers on how to make this move</p> <p>On-site events, show level of engagement with residents</p> <p>Tips and tricks</p> <p>Relationship Building - Keep buyers moving forward in a positive way</p>	<p>Provide as much information as possible on a "Day in the Life" at Heritage Harbor</p> <p>Continue to connect potential buyer with residents</p> <p>Offer an additional overnight stay if needed to close the deal</p>	<p>Seamless experience</p>

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IDEAS & OPPORTUNITIES cont'd	<p>Giving them information they wouldn't necessarily expect to get => Tips, advice, assistance beyond sales pitch</p> <p>Build trust/relationship.</p> <p>Help them understand what options are</p>	<p>Ease the way - become a resource on home buying/selling, specific to selling and buying your last house, downsizing. empty nester, etc.</p> <p>Tell stories: Talk about amenities in homes, how to customize home to meet personal needs; success stories</p>		
HERITAGE HARBOR GOALS	<p>Make them aware of the community</p> <p>Make it easy for them to find community</p> <p>Get people to property to visit</p> <p>Connect to the brand - Build relationship between buyer and brand</p> <p>Show them what's available now and get them excited enough to move up their time table for moving</p>	<p>Get prospects on-site to take a tour</p> <p>Get prospects to stay on-site to experience</p> <p>Get prospects on-site to participate in an event</p> <p>Continue to build relationship</p> <p>Connect prospects with a specific sales agent</p>	<p>Get them onsite again</p> <p>Commit earlier</p> <p>Get them connected with a community member/take part of an activity</p>	<p>Create a superb customer experience</p> <p>Make the customer feel like have come home and are already part of the community</p>
PROCESSES TO ACHIEVE GOALS	<p>Advertise online and offline to make people aware of the brand. Use unique landing pages for all advertising campaigns. Offer floor plan and community downloads.</p>	<p>Continue to leverage online and offline advertising to connect with leads who haven't connected to Heritage Harbor during Inspiration phase.</p> <p>Retarget prospects who have visited initial inquiry landing pages to convert</p>	<p>Ensure have done overnight stay or in-depth tour on-site and participate in an event (intimate experience)</p> <p>Sales people need to build relationship. Needs to understand core needs of that community member.</p>	<p>Give tips: how to sell your home, staging tips, etc. (if needed)</p> <p>Triggered emails to help move buyer through the process.</p> <p>Help get buyer to a final price quicker (allowance,</p>

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PROCESSES TO ACHIEVE GOALS cont'd	<p>Make sure we have listings in most popular directories.</p> <p>Attend events both real-estate and other. Notify existing leads that you will be at these events via email.</p> <p>Send direct mail invitations that direct to event landing page.</p> <p>Optimize keywords for both paid and organic search and social.</p> <p>Leverage social media to engage people in conversation. Recruit brand ambassadors from existing residents and staff to get prospects to start to personally connect with the community.</p> <p>Plan on-site events at least every other month.</p> <p>Ex: Open House, interior design, chili cook-off, reverse mortgage presentation.</p> <p>Make sure we have a good process to get attendees information for open houses and get that info entered into the CRM.</p> <p>Set up specific landing page for events and have direct</p>	<p>them to a tour or event attendance.</p> <p>Target people by interests (hiking, fishing, boating) - focus on amenities that are unique to Heritage Harbor</p> <p>Continue to attend real-estate events & invite existing leads to come see you.</p> <p>Send personalized invites to events or tours for existing leads (via email and snail mail)</p> <p>Advertise appropriate events in local publications or via signage</p> <p>Leverage social media to provide content that specifically addresses concerns and issues.</p> <p>Provide additional resources & blog posts on website to address concerns and issues.</p> <p>Tap brand ambassadors to connect with specific leads at events or tours.</p> <p>Email existing leads with invitations to tour or events.</p>	<p>Identify triggers: CRM can help, level of tour, may tell them</p> <p>Help understand build process (if applicable)</p> <p>Leverage automated emails mixed with calls to continue to move lead forward as quickly as possible</p> <p>Make sure sales team is continually evaluating leads in this status to see what needs to happen to move them forward</p>	<p>incentives, etc.). Upgrade catalogue - can help a user pre-select finishes.</p>

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PROCESSES TO ACHIEVE GOALS cont'd	<p>mail, ambassadors, and event hand-outs that invite prospects to go to landing page to sign up to attend event.</p> <p>Create a library of useful content that can be given to prospects at various stages to build that relationship, especially if they aren't ready to talk to someone face-to-face yet. These should be in PDF and downloadable. Available for online and offline use.</p> <p>Once we have captured email address, via sign up for an event, request for information, or responded in any other way, enroll them in the appropriate nurture workflow. Include opportunities for prospects to request additional information to continue to build the relationship.</p>	<p>It may be impossible to tell just from a form submission (on-site or on landing page) which phase a lead is in; however, leverage other data in CRM to help determine which phase in the Customer Journey the prospect is in.</p>		
TOUCH POINT CHANNELS	<p>Local publications & newspapers</p> <p>Real estate shows like Ideal Living</p> <p>Directory listings like Private Communities</p> <p>Google local listings</p>	<p>Outbound calls</p> <p>Emails</p> <p>Paid retargeted ads</p> <p>Social media on: Facebook & Instagram</p>	<p>Calls</p> <p>Emails</p> <p>Boosted organic content</p> <p>Retargeting/remarketing content</p> <p>Blog/lifestyle content</p>	

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TOUCH POINT CHANNELS cont'd	<p>Paid advertising on: Google, Bing, Facebook, Instagram</p> <p>Social media on: Facebook & Instagram</p> <p>Community website</p> <p>Email nurture</p> <p>Outbound phone calls</p> <p>Influencers: Realtors, builders, online influencers, designers, adult children</p> <p>PR: Guest blogging or speaking, coverage in local news, magazine stories, awards</p> <p>Sales support staff</p> <p>Sales rep (tours)</p> <p>Brand ambassadors</p>	<p>Website - Blog/stories/news, downloadable resources</p> <p>Influencers: People who can help ease their mind</p> <p>Financial planners</p> <p>Webinars/Facebook Live broadcasts</p> <p>Build referral partner network => send them to partner to help get them past that question</p> <p>Sales support staff</p> <p>Sales rep</p> <p>Tours</p> <p>Events</p> <p>Brand ambassadors</p> <p>Activities director</p> <p>Shows</p>	<p>Facebook/Instagram - after events, upload photos.</p> <p>Social response - Connect with person online at a very personal level. Respond to positive, negative, and neutral comments.</p> <p>Open Houses/VIPs</p> <p>Incentives</p> <p>Shows</p> <p>Tours</p> <p>Events</p> <p>Sales support staff</p> <p>Sales rep (tours)</p> <p>Brand ambassadors</p> <p>Activities director</p>	
CONTENT NEEDED	<p>Invitations - Direct mail</p> <p>Print ads - Local newspaper</p> <p>Paid search ads</p> <p>Paid social ads</p> <p>Landing pages</p> <p>Compelling organic social content, especially video</p> <p>Blog posts</p>	<p>Remarketing ads focused on tours and/or events</p> <p>Tour & event landing pages</p> <p>Personalized tour and event invitation emails</p> <p>Personalized tour and event paper invitations</p> <p>Print ads for events</p>	<p>Call scripts</p> <p>Emails (personal contact or video)</p> <p>Personal notes for tours and in-person visits</p> <p>Resident "buddy" that can help them/meet or greet them.</p> <p>Referral - Ambassador program</p>	

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CONTENT NEEDED cont'd	SEO optimized website Trade show booth & collateral Directory listings Community collateral Content to help brand ambassadors Floor plans Printable and electronic resources that address prospects concerns, goals, etc. Tour/Welcome kit Event attendee registration materials Call scripts	Social media posts focused on issues and concerns, including video Additional resources on website and for distribution addressing issues and concerns from this phase Content to help brand ambassadors make closer personal connections Testimonials Webinars Educational videos List of potential referral partners (see previous list) Call scripts Photos and video from activities director	Activities director touch points - personalized name, she follows up after an event (can be automated) Additional resources. Comparison tools, highlight things that are differentiators for Heritage Harbor Video	
KEY PERFORMANCE INDICATORS	Website visits Calls (tracked with trackable phone numbers for all campaigns both online and offline) Leads/Inquiries Follow on information requests Tours Event attendance Social media engagement	Content downloads Tracked calls Leads Follow on information requests Tours Event attendance Social media engagement Referral partner visits Webinar attendance	Tours Event attendance Content downloads Tracked calls Visits to show booths Social media engagement	Signed contracts and sales!