



CASE STUDY

REAL ESTATE



Organization:

LeylandAlliance LLC

Industry:

Real Estate

Web site:

www.leylandalliance.com

Products:

GoldMine®

Solutions Partner:

Profit Dynamics Group

Traditional Neighborhood Developer Finds Contemporary CRM Advantage With FrontRange Solutions® GoldMine®

CUSTOMER PROFILE

When Monica Quigley joined LeylandAlliance in the fall of 2001 as Vice President of Sales and Marketing, one of her first responsibilities was to find a Customer Relationship Management (CRM) software solution for the numerous real estate projects the company would be developing across the East coast. LeylandAlliance, which had built its reputation on the development of high-end suburban communities in Orange County, New York and the historic renovation of landmark buildings in New York City, had made the decision in 2000 to focus exclusively on developing new, traditionally-designed neighborhoods based on the principals of New Urbanism. By 2001, the newly structured company already had four projects on the drawing board and additional projects were on the horizon. Ms. Quigley and her associates needed to work fast to have a CRM solution ready before sales started.

BUSINESS NEED

LeylandAlliance's CRM needs were complicated. With projects in four states, the company serves as exclusive developer for some projects and partners with other traditional neighborhood development companies for others. In addition, LeylandAlliance serves as the builder for two of its projects, while vertical construction at its other projects is handled through a Builders' Guild program. To complicate matters even further, while real estate sales

at most of its projects would be handled exclusively through on-site offices, inventory at East Beach, its Norfolk-based project, could be listed with either the company's on-site sales office or with outside real estate companies. The right CRM program would need to be robust and flexible in order to address these challenges.

Ms. Quigley and her associates at LeylandAlliance, including Paul Gratzel, Vice President of Finance and Operations, and Stephanie Meloon, Marketing Coordinator, first worked to establish clear goals for the CRM project. The team wanted a program that would enable them to view sales activity from a distance, with real time capability, thereby allowing them to monitor the company's investments. They wanted to establish a minimum standard for customer follow-up at all projects that would reinforce the company's brand promise of providing outstanding service. They wanted to reduce the inquiry-to-sale ratio by providing tools that would enable sales staff, and therefore the projects, to be more successful. Capturing market data and analysis reports were another important item in order for LeylandAlliance to target its advertising and marketing dollars more efficiently (media, direct mail, etc.) and be able to quickly adjust the marketing communications schedule, if needed. Another essential feature the team wanted was the ability to create custom reports using any of the data fields – an



Business Benefits:

- A single database hosted on the company's server and divided or "curtained" by property enables sales staff to access only the data they need to see.
- Two 'master users' were created to create customized tabs, fields and drop-down menus, as well as having the ability to view all collected data and run comparison reports across projects.
- GoldMine organizational tools help the staff focus on selling and spending time with customers, while keeping track of business and moving the sales process forward.

evaluation tool that would be appreciated by everyone from individual sales staffs to management, owners and investors.

THE GOLDMINE SOLUTION

The team began extensive research to see if it could find an integrated Enterprise Resource Planning system (ERP) that would meet all the company's needs, from sales and marketing, to accounting and production. It quickly became apparent that no single program was appropriate. Most of the sales modules of the ERP programs LeylandAlliance explored weren't designed to manage the volume of prospects and marketing tasks LeylandAlliance anticipated, and instead focused more on customers who were ready to make a purchase. The team then consulted with other development companies and GoldMine® CRM from FrontRange Solutions repeatedly emerged as a possible solution for the sales side. Following more research, the team opted to utilize a combination of GoldMine and BuilderMT where GoldMine would be used as the CRM solution for sales operations at all projects. For the projects where LeylandAlliance would be serving as builder, customers under contract would then be entered into G1440, the sales component of BuilderMT, to follow the customer through the building process.

The team then researched Value Added Resellers (VAR) that could assist with the project, ultimately engaging Phil Montegut of the Profit Dynamics Group of Hicksville, New York. Montegut was charged with training the Leyland team and helping them create a single, customized GoldMine database that could be housed on LeylandAlliance's server and remotely accessed by project sales teams. Real time access to the database would be achievable by each of the projects' various sales staffs and accessible from work, home or travel. To facilitate these

remote connections, LeylandAlliance chose to continue working with Citrix®, which they were already using it for other purposes as well as remote connectivity.

Montegut met with the team once or twice a month over several months to provide training and customize the program. The team poured over the sales process and project and sales team structures to identify data that needed to be captured and build a program in such a way that it would be user-friendly for the company's sales teams. Quigley knew from experience that sales people would not use the program unless it was quick and easy to use.

Next, Montegut got to work customizing the software. Two master users at LeylandAlliance were identified who would be able to create customized tabs, fields and drop-down menus. A single database was hosted on the company's server and was divided or "curtained" by property. In this way, sales staff from a single project would not be able see any data but its own, although master users at LeylandAlliance had the ability to see all collected data and run comparison reports across projects.

While the ability to collect and analyze data was important to LeylandAlliance, the real beauty of GoldMine is its ability to help the sales staff be more productive and therefore more successful. GoldMine organizational tools help the staff focus on selling and spending time with customers, while keeping track of business and moving the sales process forward.

GoldMine is a contact manager, with an address book filled with easily accessed contact information. It is a communication device, working with e-mail, word processing programs and printer making it easy to communicate with one prospect or with groups of contacts. Its calendar and





organization tool help sales people keep track of pending appointments, calls and other actions so that staff can close more business more efficiently. The program maintains a history of communications and events for each contact, with links to copies of documents and e-mails. In addition, GoldMine is an automation tool that generates reminders and communications with the customer, making the sales process more efficient and enabling the salesperson to spend more time with their customers.

LeylandAlliance is developing neighborhoods in very desirable areas, including the Chesapeake Bay in Norfolk, Virginia; coastal Connecticut; a Hudson Valley village in New York and on the Savannah River in South Carolina, among other places. As a result, the company prepared to receive thousands of inquiries with a high level of customer service and follow-up. GoldMine automation tools were programmed, in conjunction with third party software Sales Magic, to respond to the inquiries and on-going communication needs. Once contacts were categorized, whether as a new lead or someone who had just put down a deposit, or anywhere in-between, GoldMine automatically generates indicated lead fulfillment materials and follow-up communications. Calls and appointments are scheduled on personal calendars with dated and timed "ticklers", letters or e-mails are generated, and sales are forecasted. These tools streamline the work of sales agents and increase productivity.

Montegut recommended the overlay program, Sales Magic, to simplify the CRM process even more. With Sales Magic, a third party application independent of GoldMine, a small number of colorful icons at the top of the menu bar represent the most frequent features the sales staffs will utilize, including their to-do lists, calls, appointments, automated

processes, new leads, documents, and reports. For example, by clicking on the new lead icon, a box appears with the questions most readily asked by the sales person. Users simply fill in the blanks and the fields that are automatically populated into GoldMine.

SUMMARY

LeylandAlliance was able to spread the \$39,648 cost, including the purchase of the GoldMine software, Citrix and Microsoft connections, and programming across several projects, making it very cost efficient on a per-project basis. Each of six projects will incur \$6,608 in software, and programming fees, which includes 6 Microsoft Terminal Serve licenses at \$80 each (for Citrix capability), 5 concurrent Citrix licenses at \$191 per user, 5 concurrent GoldMine licenses at \$512 per user, including GoldMine support/maintenance through Leyland's trained administrators, Sales Magic charges of \$106 per user, and \$2,083 in custom programming fees. Training on the GoldMine CRM solution is conducted by LeylandAlliance staff at no charge to the projects.

Response on a project basis has been very favorable. The program was installed in August 2003 at LeylandAlliance's East Beach project in Norfolk, Virginia. The sales manager, unfamiliar with CRM software, had been apprehensive at the start of training. His uncertainty disappeared quickly as he recognized the value the program could add to the sales process. After seeing what the GoldMine program can do, the general manager of Hammond's Ferry in South Carolina immediately asked for the program to be installed, even before the sales office opened. "We can use this right now," said Turner Simkins. "Can you install it on my computer today?"