

Customer Dynamics

"Our situation is really challenging, dealing with outside sales agents who are like sub-contractors for us. Everybody needs to work together. Customer Dynamics met the challenge in being innovative, thinking outside-the-box – and by being excited about meeting the unique requirements of our industry. They did a tremendous job customizing our CRM system to ensure it met our needs."

- Terri Rider, Marketing Director

Customer Profile

Chaffey Homes

Designer and builder of luxury residential homes

Chaffey Homes is one of the premiere luxury home builders in the Pacific Northwest. Based in Kirkland, WA, its 45+ year legacy distinctly marks all of Puget Sound with its trademark quality homes that accent and compliment the natural beauty of the area. Beyond quality and warranted excellence of construction, it's also known for supporting 'green,' environmental and Energy Star efficiency best practices.

Whether a custom home, a small or a full-scale neighborhood development, Chaffey Homes seeks to meet the unique needs of each home buyer, "making sure the customer experience from the onset – from first walking in the office or into a model home – is the most positive, effortless and fun as possible," says Terri Rider, marketing director.

The challenge is significant – all the more given the current economic climate. Chaffey Homes has no in-house sales staff, so is dependent on outside agents. This creates the imperative to remain knowledgeable about the status of agent deals and customer requirements, and to serve the needs of both by keeping communications open and free flowing.

At a Glance

Company

Chaffey Homes
205 Lake Street South
Suite 101
Kirkland, WA 98033

Website

www.chaffeyhomes.com

Number of Employees

35

Products and Services

Designer and builder of luxury homes

Target Market

High-end residences and fully developed neighborhoods with quality-of-life amenities

Applications Used

Microsoft Dynamics CRM - Online



Microsoft Dynamics CRM serves as the foundation. Microsoft partner and value-added reseller Customer Dynamics proved indispensable in providing Chaffey Homes the custom implementation it needed to dynamically drive its marketing and sales program.

Chaffey Homes licensed the use of the online version of Microsoft Dynamics CRM in the fall of 2008 – just as the economy precipitously tripped over the edge of the financial market meltdown. “Our CRM implementation proved the poster-child for the value of CRM. The company hadn’t had anything in place before,” says Rider, Chaffey Homes marketing director.

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Rider had implemented CRM in positions at three previous companies – none in industries similar to the home construction/real estate industry. She knew what she wanted, and after considering other solutions, elected the online Microsoft solution for several key factors. “It was internet based; was a good price, and it was easy to jump right in without a lot of red tape.” The challenge was getting it to serve the unique needs of what is, essentially, a two-tiered customer base: agents – and through them, home buyers.

“We have a unique situation in our sales environment,” she says. “We have to work with agents and home buyers – but don’t want agents to feel that we’re by-passing them in reaching customers. We have to keep in touch with both to see where buyers are in the process, and support both at every stage in that process.” Customer Dynamics helped Chaffey Homes develop two separate ‘customer’ databases, one for agents; one for buyers. It took close collaboration between the company and Customer Dynamics to structure the two separately, yet create an interdependency that linked them.

“It took some effort, but we got it ‘dialed in’ pretty quickly. Customer Dynamics did such a good job meeting our needs.”

The reality of the economy significantly impacted the sales cycle, greatly extending it. This required that the system be both adaptive and comprehensive so that Chaffey Homes could maintain visibility into the cycle, could tailor its marketing program to meet specific requirements of each prospective deal, and make management of the whole process easy and simple.

“The CRM system’s workflow makes it possible to do this, to create a tailored marketing program for each customer,” Rider says, where the company can reach out to them with a series of targeted marketing pieces designed to address issues at every stage.

This two-tiered customer approach gave Chaffey Homes the needed visibility to individual home buyers that it lacked before, and also the tools to help support agents in closing the deal. “Agents are critical. They provide us valuable information on our customer’s needs and wants. We need to know what customers are asking for. If they’re asking for five bedrooms, but we’re only building four-bedroom homes, we need know that. We also like to know how many times an agent shows a house. We like to thank them for their efforts to help sell our homes. Customer Dynamics came up with a solution to easily monitor their sales.”

In the tight economic market, Microsoft Dynamics CRM enables Chaffey Homes to closely manage every opportunity, to tightly focus its efforts where the opportunity is strongest, yet not lose sight of prospects who might push out the decision for as long as a year or two. The company starts with quality construction, and now follows that up with quality customer care that leads to most cost-effectively moving people into the homes of their dreams.

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