



Lumin.ai

CASE STUDY

How a Leading Home Developer Used Lumin.ai to Double Their Prospects

About Southern Homes

Southern Homes of Polk County is a medium-sized home builder in central Florida, operating more than 20 varied developments in 9 cities. Typically maintaining a dozen active model centers concurrently, Southern Homes derives marketing synergy from a multi-segment strategy.

“ You’re sure to find the right Southern Homes community for you, your family, and your lifestyle. ”
—Southern Homes website



Given the opportunity to show a prospect around a model center, Southern Homes knows how to impress the homebuyer with a perfect fit. Their "My Home, My Way" program even takes the falling-in-love process all the way to interior design: every model center is equipped with a design room that holds interior and exterior decorating choices.

Southern Homes: The Challenge

Ashley Link is the Director of Marketing at Southern Homes. One of her top priorities in 2020 was to boost the volume of contacts with potential homebuyers, whether virtually or via physical visits to these model centers. She needed a cost-effective way to achieve this while juggling conditions that spelled opportunity.

- ▶ Recent success in dramatically boosting lead volume, but no effective way to follow up on every lead
- ▶ Increasing time pressure as prospective homeowners are courted by multiple competitors
- ▶ A broad spectrum of buyer personas, including prospects with focus and urgency, early-stage shoppers with uncertainty about model-center choice, out-of-towners with tight schedules, and a growing interest in virtual visits out of concern for COVID-19
- ▶ An online sales counselor whose days were already saturated with manual follow-up tasks, hindering the ability to benefit fully from the surge in leads
- ▶ A complex matrix of resources and opportunities, with multiple locations and different salespeople staffing each location from day to day

“ This was a top priority. Especially with the influx of leads, we saw the immediate and tremendous opportunity of converting at a higher rate. ”
—Ashley Link

While these conditions were fairly complex, the strategy and the solution were simple.



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Case Study: Southern Homes

www.lumin.ai

Southern Homes: Communication Strategy

To capitalize on increased traffic to the Southern Homes website, Ashley had successfully implemented a best-of-breed live chat service for website visitors. Calling this a game changer, she described an impressive increase in lead volume. She also saw the importance of extending this momentum further along the sales pipeline, and turned to bridging the gap between lead and first direct contact.

- ▶ How could Southern Homes follow up promptly, yet make it easy for buyers to respond on their own time?
- ▶ How could Southern Homes accommodate people with varying degrees of readiness to meet, and a spectrum of needs regarding how and when to meet?
- ▶ How could she increase lead-to-appointment conversion for online chat from its baseline level of 14.6%?

The answer clearly lay in complementing live webchat with AI-driven text messaging to close an appointment. The customer could then "detach" from the live-agent session and take as long as necessary to go about other activities and household discussions before committing to a next step. Either way, a low-friction way to respond would always be within easy reach, and the follow-up from Southern Homes would be instant.

Solution: The Lumin.ai Smart Scheduler

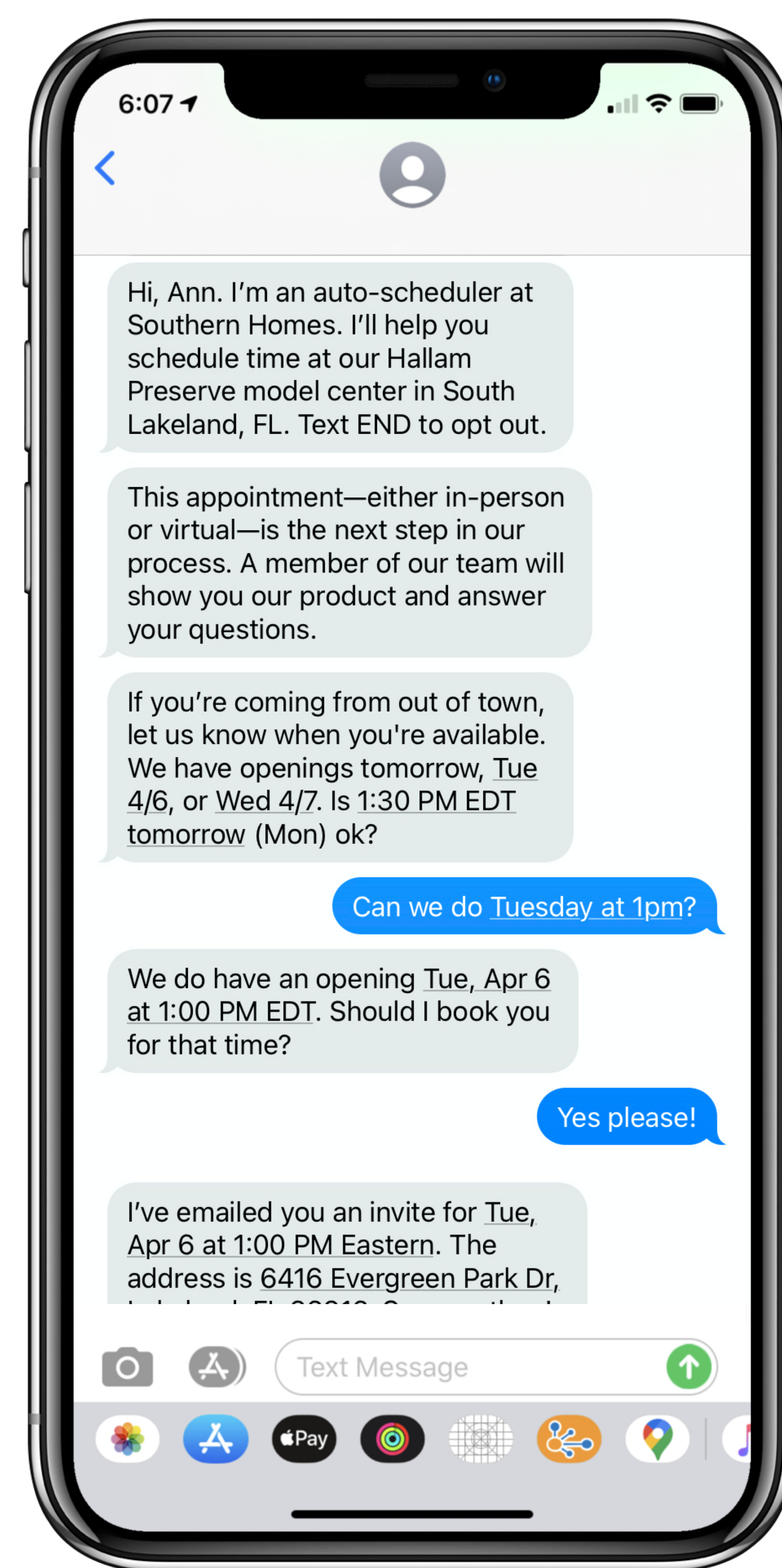
Lumin.ai integrated its Smart Scheduler solution with the Southern Homes environment. Implementation was simple: as if providing access to an employee, Southern Homes shared its dozen calendars and lead feeds with the Smart Scheduler.

Every prospective homeowner with a mobile phone and choice of model center received a text within seconds and could schedule, reschedule, and cancel appointments. The system honored business rules such as providing a minimum amount of lead time so that staff members could be ready for each appointment.

Thanks to the Smart Scheduler's built-in conversational AI, the prospect could communicate in natural-language sentences with no prior instruction or exposure, and without having to stick to a rigid flow preconceived by a software developer. Unlike a "virtual assistant" used in a smartphone or smart speaker, the Smart Scheduler holds multi-turn collaborative conversations.

In addition, the prospect could communicate whenever desired—either immediately or much later—and anticipate an immediate response. Unlike a phone call or a website visit, where the opportunity to engage is fleeting, the Smart Scheduler could hold a single conversation over hours to days.

Southern Homes staff members saw each calendar automatically populate with appointments, both physical and virtual, and received real-time notifications of every change.



Conversational AI via text messaging combined infinite patience with rapid responsiveness in a way that no human attendant could replicate.



Southern Homes: The Results

The system supported multiple buyer personas with ease.

Active househunters

It scheduled many appointments within two minutes, winning Southern Homes the coveted first position on the visit list.

Slow bloomers

Many homebuyers re-engaged without being prompted, spurred by a private change of circumstance otherwise invisible to Southern Homes. Frictionless accessibility was paramount.

Out-of-towners

For individuals with constrained, dynamic visit schedules, the Smart Scheduler coordinated last-minute changes behind the scenes, and honored business rules to avoid surprising Southern Homes staff.

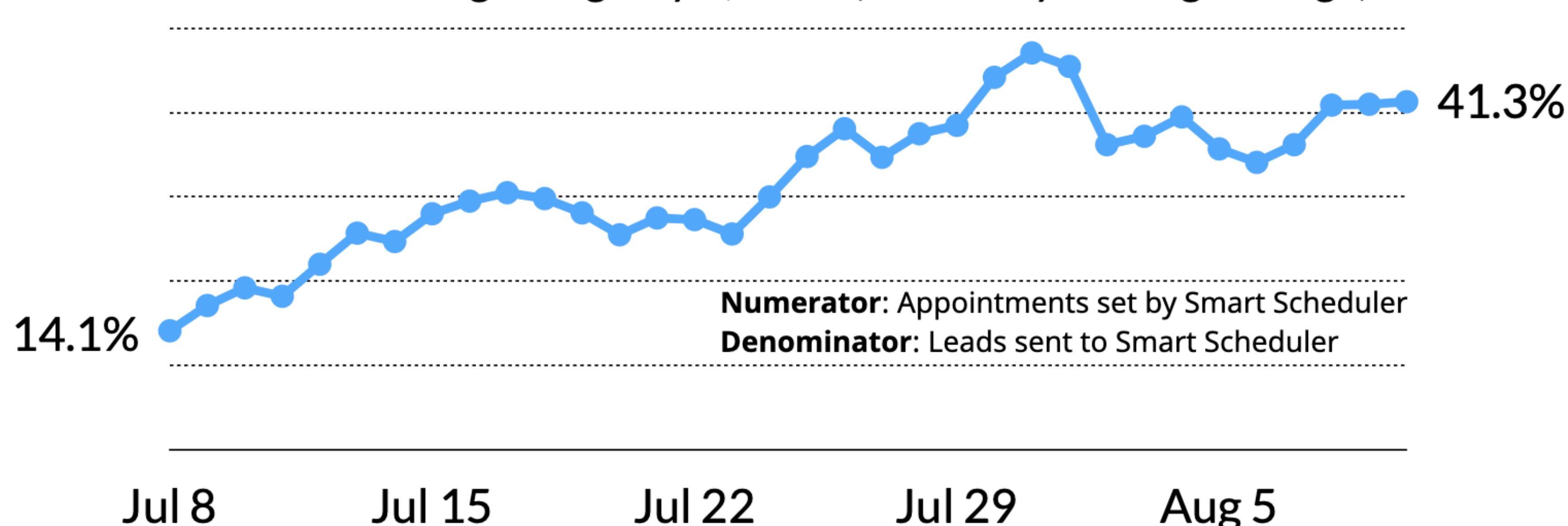
Guidance seekers

The Smart Scheduler coordinated virtual visits with an online sales counselor at Southern Homes who could help with community choice and, more importantly, establish a relationship with each prospect who was on the fence.

Across all of these personas, buying a home is a major milestone requiring consensus and coordination between multiple decision makers. Because of the AI's infinite patience and 24/7 rapid responsiveness, members of a household could take their time to agree on how best to interact with Southern Homes.

Lead-to-Appointment Conversion

Five weeks beginning July 8, 2020 (seven-day moving average)



Southern Homes met or exceeded all of the goals associated with the project.

The most important metric tracked by the team is the rate of conversion from lead to prospect, where a prospect is defined as a potential homebuyer who makes an appointment and keeps it. The result was a strong and rapid return on investment (ROI).

Most importantly, using AI as part of its strategy for serving the needs of its prospective homebuyers has helped Southern Homes empower its employees with increased opportunity and job satisfaction.

One staff member mused about the period where lead volume had dramatically increased but the Smart Scheduler had not yet been implemented:

“It was a great problem to have, but it was too much for us to handle alone. There were just too many leads to follow up with.

“The Smart Scheduler became an extension of our team by working to convert a segment of our leads, while allowing us time to focus on other leads.

“As a result,” she pointed out, “we also saw increased conversion from other lead sources.”

“Conversion rate from lead to prospect more than doubled in the first 30 days after Smart Scheduler launch and optimization.”



Ashley Link
Director of Marketing
Southern Homes