



GUIDE

HOUSEBUILDING



House Building & Property Development Software
- powered by SiteStream



EQUE2

Improve your customer journey with Eque2's Housebuilding Sales module

Better customer service, more targeted marketing and more accurate reporting; it's all possible with the Sales module, part of Eque2's Housebuilding software.



Engagement

Critical to a successful legal completion is good-quality, early, GDPR-compliant engagement with customers. With the Sales module, targeted or bulk email and text campaigns are easily run to generate leads, and enquiries are then tracked and managed centrally.

FEATURES AND BENEFITS:

- Advanced search according to any metric to build and collate prospective marketing lists
- Produce automated marketing campaigns to generate leads easily
- Monitor campaign success rates and adapt campaigns in real time
- Housebuilding seamlessly integrates with your website or sites like Rightmove
- Customised emails and style sheets turn enquiries into loyal customers



Enquiry

The Sales module offers customer relationship management designed with housebuilders in mind, which is why it allows your sales team to track every action on every lead from a single point, allowing you to maximise conversion rates.

FEATURES AND BENEFITS:

- Instant enquiry search function
- Record and track every customer enquiry
- Automated follow up and rescheduling
- Automated tasks for chasing work
- Customised email and letter style sheets
- Full contact logging with email and text
- All sales literature linked to site and plot and available from site office



Reservation

Give your customers a unique insight into the sales process by letting them reserve their own plots and allowing them to track the project up to development stage.

FEATURES AND BENEFITS:

- See and track all costs and revenues
- Interact directly with customers via email and text
- Review choices, incentives and upgrades
- Automated email notifications
- Chase work tasks for the sales negotiator
- Track all costs and revenues direct from a customer's record
- Record PX if required
- Sign and scan reservation forms back into the plot



GUIDE

HOUSEBUILDING



House Building & Property Development Software
- powered by SiteStream



EQUE2



Exchange

Record every detail of every exchange using document management and useful workflows, so you have all the data you need for past and future leads at your fingertips.

FEATURES AND BENEFITS:

- Automated exchange notifications
- Track handovers from reservation to full exchange
- Automated email notifications
- Chase work tasks
- Link all contracts to the plot
- Update choices and apply incentives and upgrades
- Manage payments for upgrades and notify status of work



Completion

The Sales module makes the final stage of the process easy. It manages the legal completion money, emails the financial statement to the solicitor and allows the values calculated in sales to be passed across to the finance department for reconciliation with the solicitor's final payment.

FEATURES AND BENEFITS:

- Automated Legal completion
- Pass completion value across to accounts
- Provide financial settlement emails to customers
- Allow all legal and specification documentation to be linked to the plot and available for the customer care team
- Easily manage customer handovers

Benefits from top to bottom

For the sales negotiator...

It's simpler than ever to access screens which allow for rapid capture of customer details and easy reservation

For the sales administrator...

It's possible to take control of the entire sales process with deep sales order processing

For the sales manager...

You can gain full visibility of site activity and analyse problem areas with simple overview screens

For the sales director/MD...

Fully enriched standard reports provide in-depth analytics on every aspect of the project, allowing build and sales data to be displayed together on one simple interface



See what Housebuilding could do for your business:
www.eque2.co.uk