Click To Contract

A practical guide to turn online interest into signed contracts.

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Executive snapshot

This ebook lays out the systems and the simple steps that move a buyer from first click to contract. It focuses on inventory clarity, appointment booking, selections that carry through, and fast routing. Each section gives a quick fix and the next step to scale.

Three outcomes you will care about

- Faster qualified appointments that show up
- Fewer selection errors and fewer costly change orders
- Cleaner attribution so marketing links to contracts

Request a free sales process audit and get a one-page executive performance brief.

Schedule your [free sales process audit] today.

Tip: Use the sales process audit to find the blind spots you cannot see from inside the day to day. The audit is free and delivered as a one-page decision ready brief.

The buyer vignette

A couple browsing a community site late at night spots a floor plan they love. They want to schedule a tour, but the calendar only shows generic time slots. So they call. The sales rep can't remember which lots they looked at. By then, the couple's already checking out a competitor's site—one with live lot maps and instant booking. That moment of not being heard costs the sale.

What went wrong:

The buyer had intent but no way to lock a specific lot or specific time.

How it made them feel:

They felt frustrated and uncertain. Negative emotions kill momentum.

The cost of friction:

Lost trust is not free. It lowers conversion and raises the cost of every future marketing dollar.

Where leaks happen

Five common friction points that stop contracts

Search and discovery
Problem: Buyers arrive but cannot see which lots are live.
Consequence: They move to a competitor who shows real-time availability.

Lot selection and clarity
Problem: Site plans look static or out of date.
Consequence: Buyers postpone booking until they can be sure.

Appointment booking and context
Problem: Calendar booking does not attach the buyer viewed lots.
Consequence: The first meeting starts with basics and the buyer loses confidence.

Design selections and data flow
Problem: Choices made in a digital studio do not land in CRM or ops.
Consequence: Manual reentry creates errors and late selection changes.

Handoffs to operations and costing
Problem: Selections are not linked to job costing or purchase orders.
Consequence: Finance sees surprises and margins erode.

Tip: Fix the first three items and you will usually see the fastest wins.

The click to contract architecture

Inventory powers discovery. Interactive maps make what's really visible. Virtual tours help buyers imagine the space. CRM stores intent and tracks the next steps. Review and CX layers build trust. Operations and costing close the loop so the contract reality matches the buyer promise.

Event stream example:

Lot view → appointment book → selection confirm → audit submit → contract signed

Data and events to track:

Record the lot ID, the time of the click, the model viewed, the appointment time, the selection version, and the audit outcome. That data creates context for every human conversation that follows.

Quick wins that move the needle

Three actions that produce measurable improvement

Turn on live lot availability on the web
Why: Buyers need to know which lots are available now.
How: Publish LotVue or your inventory source to lot pages with hourly or near real time sync.
Impact: Higher appointment conversion.

Add appointment booking per lot
Why: Specific appointments create commitment.
How: Let buyers reserve a time for a specific lot and capture the lots they viewed in the booking form.
Impact: Better first meetings and higher show rates.

Capture lot and selection events in CRM
Why: Context matters in the first call.
How: Persist which lots were viewed, which models were favorited, and which design options were previewed.
Impact: Shorter discovery conversations and cleaner handoffs.

Mini checklist: Are you set up to succeed?

- ☑ Enable live inventory feed
- ☑ Add lot level booking widget
- ☑ Map events into CRM

Turn these three on and you will see clearer appointments and higher quality first calls.

Sales playbook and messaging

Four short templates to use now

Text: OSC opening line

> "Hi, I am [Name] with [Builder]. I see you were looking at Lot 12 and the Maple plan. What questions do you have about that home?"

Text: Booking confirmation

> "Thanks for booking. You reserved Lot 12 for 11 a.m. on Saturday. Here's a short link to review the lot and the virtual tour before your visit."

Text: Audit pitch for higher intent leads

> "We offer a free sales process audit that maps where your buyers drop off. It takes seven business days, and it comes with a one-page executive performance brief. Would you like us to schedule that for your team?"

Email: Subject lines

- See your lot before you arrive
- Confirmed: Lot 12 at 11 a.m.
- Free audit reveals your top three sales leaks

Role-specific sales playbooks for new home construction teams

- Online Sales Consultant Playbook
- In-Home Sales Representative Playbook
- New Homes Sales Leader Playbook

Download the new homes sales playbooks today.

Tip: Make the audit at the end of the conversation, not the start of a debate.

Design selections that flow

Four micro steps to stop translation errors

Map selection fields to CRM fields
Capture the exact SKU or option ID so nothing gets lost in translation.

Add images and context to selection records
Pictures remove ambiguity. They stop wrong color calls.

Record timestamps and versions
Show who changed what and when. Versions avoid arguments.

Connect selections to job costing early
Give finance an early view so surprises drop at closing.

Example workflow:

Buyer selects options online.

The system creates a selection record in CRM.

Operations accepts the record and routes it to ordering.

Tip: When a buyer sees confirmation of their choices, the trust gap narrows.

Routing SLAs and handoffs

Trigger	Owner	Response target
High intent lead from lot page	OSC or assigned BDR	15 minutes
Appointment booked	OSC or AE	Confirm within one hour and send pre visit materials

Best practice flow:

Claim the lead. See what they looked at. Call with context. Confirm the appointment and send a short prep email that includes lot images and the virtual tour.

Why SLAs matter to buyers:

Fast responses show respect and built trust. Slow responses create doubt and open the door to competitors.

Tip: Speed equals trust. Numbers prove it.

Measurement cheat sheet

Events you must track: lot views, appointments booked, demo watched, selection confirmed, audit submitted, and contract signed.

Suggested UTM examples:

Use consistent UTM naming like utm_source, utm_medium, utm_campaign.
Example campaign value: utm_campaign=click_to_contract_q3

Five KPIs to watch weekly:

- Lot page views per session
- Appointment conversion from lot pages
- Time to first lead response
- Audit booking rate from paid and organic channels
- Audit to demo conversion rate

Tip: You cannot improve what you do not measure. Track the whole funnel from session to signed contract.

Customer success story: Timberlake Homes

Lasso CRM drives sales and marketing to record success levels

Bob Rayman, Internet Sales Manager at Timberlake Homes, calls Lasso an essential part of their operations. Their website acts as a sales center, and Lasso is the tool they use to manage and track incoming leads. The system simplified daily work, improved professional appearance, and helped the team convert more leads into sales.

Timberlake shows how a CRM that captures web driven activity and nurtures it makes the rest of the journey smoother. When leads are tracked and followed with consistent messaging, the whole funnel tightens. That makes appointments more productive, and demos easier to book.

> **"Lasso has clearly become a critical part of what we do at Timberlake Homes. It has added to our professional appearance in the marketplace, has helped our sales team become more productive and efficient and it's given the company a very useful sales management tool."**
>
> **—Bob Rayman, Timberlake Homes**

The free sales process audit, roadmap, and FAQ

The audit explained

What we do:

We review your search to signature workflow. That includes inventory accuracy, appointment booking, selection flow, lead routing, and measurement. We deliver a one-page Executive Performance Brief that highlights the top three leaks and the expected impact of each fix.

Timeline and deliverable:

- Intake and data request: day one
- Analysis and scoping call: day two to day three
- Audit delivery: within seven business days as a one-page brief

What you get:

- Clear list of three prioritized fixes
- Rough impact estimate on conversion and margin
- Practical next steps and owners

90-day roadmap example:

- Month one: Quick wins — live lots, lot level booking, CRM event capture
- Month two: Integrations — selections, mapping, virtual tour links, basic costing handoffs
- Month three: Automation — advanced routing, SLA automation, full event reporting

Sales process audit FAQs

What is the audit cost?

The audit is free. We deliver a one-page executive performance brief to help your prioritize fixes.

How long does the audit take?

We deliver the brief in seven business days after intake and scoping.

Do you need access to live systems?

We often work from exports and screen shares. System access speeds analysis but is not always required.

Will the audit recommend specific vendors?

The brief focuses on process fixes and data flows. If product gaps show up we will outline options and next steps.

Can we use the ebook without doing the audit?

Yes. The ebook is a practical guide. The audit accelerates the work by showing your highest impact fixes.

Stop guessing where your sales are leaking.

Request your free sales process audit and get a one-page executive performance brief that highlights your top three fixes and the expected impact on conversion and margin.

SCHEDULE YOUR FREE SALES PROCESS AUDIT