



**REAL ESTATE**  
CHECKLIST

Enhancing Client Experience

**A FULLY INTEGRATED CLOUD COMMUNICATIONS PLATFORM IMPROVES CLIENT EXPERIENCE BY SUPPORTING:**

- › Client experience, outreach, and engagement, within and beyond the office
- › Flexible communication in customers' preferred channels (phone, chat, text, video)
- › Mobile solutions for on-the-go agents
- › Client showings/contractor coordination and scheduling
- › Ease of use for all departments – from marketing to sales to finance to contracts to design to legal

**COMMON ISSUES FACING REAL ESTATE FIRMS**

- › Cumbersome appointment scheduling
- › Managing the back-office tasks
- › Cost of direct mail that goes unanswered
- › Adapting to technology



**ONE COMMUNICATIONS PLATFORM    ONE LOW MONTHLY RATE**  
PHONE | VIDEO | CHAT | CONTACT CENTER | FILES | EMAIL

# UNIVERGE BLUE CLOUD SERVICES REAL ESTATE CHECKLIST



## OUR SOLUTIONS CAN HELP SOLVE THESE ISSUES

	YOUR NEEDS	OUR SOLUTIONS
SCHEDULING AND SERVICE EFFICIENCY	<ul style="list-style-type: none"> <li><input type="checkbox"/> Eliminate dropped calls</li> <li><input type="checkbox"/> Reduce hold times</li> <li><input type="checkbox"/> Routing calls to the correct department</li> <li><input type="checkbox"/> Maximize agents' schedules</li> <li><input type="checkbox"/> Deliver home showing reminders effectively</li> <li><input type="checkbox"/> Minimize scheduling friction and generate ongoing client loyalty</li> </ul>	<ul style="list-style-type: none"> <li>✔ Customize call flows for more-efficient interactions and scheduling</li> <li>✔ Route incoming calls to staff with optimal combination of idle time and skills</li> <li>✔ Eliminate busy signals with queuing, and provide in-queue music and voice playback</li> <li>✔ Deliver timely (and, if needed, repeated) reminders of house showing times, open houses, closing documentation list and more, with Dynamic Notifications</li> <li>✔ Extend reach with integrated chat, SMS, video conferencing, screen sharing, file sharing, and file backup, while increasing collaboration and efficiency within the real estate firm</li> </ul>
MULTICHANNEL CLIENT SERVICE	<ul style="list-style-type: none"> <li><input type="checkbox"/> Enable efficient, integrated, and frustration-free client interactions, regardless of channel, from first contact to after-sales service</li> <li><input type="checkbox"/> Support clients' expectations of seamless and interchangeable communication via multiple channels</li> </ul>	<ul style="list-style-type: none"> <li>✔ Minimize transfers and eliminate dead ends with intelligent routing and self-service interactive voice response (IVRs) which help automate common requests</li> <li>✔ Accept client inquiries via SMS, chat, and email, in addition to phone calls – all with one platform</li> <li>✔ Support integrated chat, SMS, video conferencing, screen sharing, file sharing, and file backup</li> </ul>
MOBILE SALES	<ul style="list-style-type: none"> <li><input type="checkbox"/> Untether and support a mobile real estate team</li> <li><input type="checkbox"/> Support easy, efficient, and quick communications among departments</li> <li><input type="checkbox"/> Extend reach and facilitate increased collaboration</li> </ul>	<ul style="list-style-type: none"> <li>✔ Create a more flexible and effective team with anytime, from anywhere, and on any device, communications</li> <li>✔ Allow agents to never miss important calls or texts and provide the option to easily collaborate from office to car to home site – all with our Mobile App</li> <li>✔ Integrate the solution with applications such as Google, Microsoft, Salesforce, and more</li> </ul>
CLIENT LOYALTY AND ENGAGEMENT	<ul style="list-style-type: none"> <li><input type="checkbox"/> Enact proactive and meaningful outreach</li> <li><input type="checkbox"/> Extend reach with dynamic, high-value notifications</li> </ul>	<ul style="list-style-type: none"> <li>✔ Use Dynamic Notifications to send outbound voice, SMS, and email notifications about the housing market, interest rates, new real estate listings, open houses, and other communications to keep your real estate firm top of mind</li> </ul>

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