



A stone and siding exterior, along with plenty of windows to let the light in (and out), give this Newport Beach, Calif., project from Patterson Custom Homes a charming evening glow. *Builder: Patterson Custom Homes, Architect: Brandon Architects, Interior Designer: Churchill Design, Photo: Chad Mellon*

How building firms can optimize their customer experience

For builders and contractors, a better customer experience can turn clients into brand advocates.

Patterson Custom Homes is on a mission to reinvent the construction experience.

That's because the traditional new home construction process has given general contractors a bad rap. Typically, clients would work with an architect to design their dream home, only to be stunned when construction bids from GCs come in way over budget and timelines stretch indefinitely into the horizon.

[Patterson](#) aims to restore faith in GCs by beginning its relationship with clients as early as possible in the process, often before the client even has a lot. The Orange County, Calif., builder helps clients select an architect that fits their aesthetic and budget, tracks costs during the schematic design phase to keep them within expectations, and then provides personalized service during and even after construction.

"The feel and the experience that we want our clients to have is that they're not just hiring a

general contractor who could build their home and then walk away," says Brittany Newman, Patterson's director of marketing, client relations, and acquisitions. "We welcome our clientele into what we call the Patterson family."

The impact of customer experience on the bottom line

Patterson is one of several construction firms focused on differentiating themselves by rethinking customer experience, the entire set of interactions



BEYREP's platform provides transparency on project progress, making it easier for building pros and their clients to track all of a project's communications, payments, and updates in one place.

that clients have with their builder or remodeler. As customer experience, or "CX," becomes a buzzword in the corporate world, construction firms are taking the principles of CX to heart in order to turn their clients into evangelists.

Those thrilled customers can turn into free word-of-mouth marketing that can have a big impact on your bottom line, says Grace Mase, founder and CEO of [BEYREP](#), a project management tool and app that also functions as a matchmaker for pros and potential clients.

"When your customers are happy with your brand, they develop brand loyalty and affinity," Mase says. "And then they will start to evangelize your brand or your products and services and refer you to their friends and families and also leave positive reviews. And ultimately, you'll have more business just by word of mouth, which is free of charge for you."

Mase sees customer experience as a two-part recipe: people and service. "How do you delight

your customer with your service?" she asks. "And are your customers blown away by your engagement on how you helped to solve their problem, either on or off the job site?"

Infusing customer experience throughout your organization

[Thomas James Homes](#) distinguishes itself by making customer experience part of its core values. The Aliso Viejo, Calif. firm is the nation's largest single-lot, new home replacement builder, buying older homes in desirable neighborhoods and replacing them with modern construction. But while the company started in 2006 by completing construction on its new homes before listing them for sale, vice president of sales and marketing Gina Nixon says the company soon realized it could create a better customer experience by bringing the buyer in earlier, at the design stage. The company calls it "Build on Our Home Site."

"If a buyer comes to us and enters into escrow early, they go through a full, one-on-one, custom design process," Nixon says. "It starts from our already cultivated design package. We let the home buyer understand what is included in the price that they purchased, and then customize it however they want." And last year, the builder launched a new "Build on Your Home Site" option that allows clients to start even earlier, taking a sledgehammer to an old home on their own lot before building their brand new house.

The goal, Nixon says, is to reduce the stress of urban life for the company's buyers and to treat everybody like family. "Customer service and their experience, working with every member of our team, is at the top of mind throughout the process," she says.

Mapping the customer journey

Because home buying is such an experience-driven process, it's helpful for builders to step back and look at the customer journey as a whole. Mase recommends pros go through the process of road-mapping that journey, interviewing customers to get to know them better and understand their pain points and preferences. Then map out all the potential touchpoints they'll experience with your company, starting with first contact. "Even the first phone call or the first email, how do you reach out to them?" she asks. "Do you meet with them in person? How do you greet them?" Once you understand your customer's needs and preferences, you can prioritize different ways of engagement.

One common attribute among companies focused on customer experience is that it's built into their firms' DNA: Everyone on the team knows the mission and shares the same core values.



Interactive touchscreens allow prospects to explore a community from the sales office or even see different structural alterations they can make in a house plan.

BEYREP has "objectives and key results," or OKRs, tied to customer experience. "When we talk to our customer every week at their job site, we learn many things about them," Mase says. "We always come back and find ways to improve their experience, their journey, and find ways to support them throughout the cycle."

Crafting early sales touch points

At the early stages of the buyer's journey, crafting the touch points frequently requires strategic use of technology. Bob Musa, president of homebuilder software provider [Computer Presentation Systems](#) (CPS), has seen his company's interactive touchscreen presentations become a popular way for prospective clients to self-direct themselves through the features of a new home community, including plans, neighborhood, and availability. CPS recently worked on a presentation where users could touch any of the hiking trails within a community to explore neighborhood landmarks. These interactive tours can do double duty on a community's website to allow prospects to tour a model remotely.

That feature has taken on sudden importance amidst the COVID-19 pandemic with builders now having to sell homes without the opportunity for face-to-face contact. But firms can still infuse those early virtual touches with as much human personality as possible.

At Thomas James Homes, Nixon says her team is doing a lot of Facebook Live invitations, where a fully masked agent is giving tours to anyone who

wants to join the live presentation. The builder uses Matterport to create [3D tours of every home](#) the company builds and has invested more heavily (about \$25,000 per tour) to create [true virtual reality tours](#) of selected new floor plans that have yet to be built. The company has stepped up its training for both internal specialists and real estate agents, providing guidance on the most effective way to utilize these virtual tools with prospective customers.

In fact, the builder's experience with out-of-state buyers has helped it prepare for a socially distant build process. Design team meetings are taking place on UberConference or Zoom and clients are taking digital trips to product showrooms. In the commemorative books that the builder assembles for homeowners when they move in, selfies are being replaced with celebratory screenshots of video conference closings. "You can still see a face, still gauge our level of enthusiasm," Nixon says. "There's still conveyance of complete honesty. It's a way, using technology, that we're keeping this human and personal."

Communication during construction

Of course, many companies have committed resources to improving the sales experience. But for companies committed to customer experience, the signed contract is just the beginning of the relationship. At Patterson Custom Homes, clients are assigned not just a project manager once construction starts, but also a project coordinator for the six months leading up to the build while the project specs are being developed. That staff-heavy



Amidst the pandemic, celebratory conference call screenshots have replaced selfies in commemorative albums at Thomas James Homes.



Patterson Custom Homes invested in staffing to provide every client with both a project manager during construction and a project coordinator in pre-construction to work with the client, architect, and interior designer on a home's specifications. *Builder: Patterson Custom Homes, Architect: Brandon Architects, Interior Designer: Blackband Design, Photo: Manolo Langis*

approach—Patterson has 25 employees, large for a GC in the area—leads to customer experience benefits, Newman says. “We’re really able to hold the client’s hand every step of the way.”

Patterson is also thoughtful about communication during the construction process. Just as the company monitors project budgets so costs don’t take clients by surprise, the builder maintains detailed project schedules with a target completion date that will move forward or backward depending on the materials they’ve selected and whether they’re making their decisions on time.

Speedier customer support

Customer experience isn’t the same as customer service. As Gina Nixon puts it, customer experience is emotional, while customer service is all about the deliverables. And of course, delivering great customer service plays an integral role in creating a satisfying customer experience.

At window and door manufacturer [JELD-WEN](#), the customer service team has developed an enhanced support program for builders and contractors called JELD-WEN Site Support. The program’s goal is to provide pros with speedier access to a technician so they’re not waiting two weeks for a site visit. Pros receive a dedicated number backed by actual technicians who use an app called OnSite that allows them to collaborate using the pro’s camera and phone.

“They’re able to zoom in, zoom out, take videos,” explains Rob Wollemann, JELD-WEN’s director of customer care for North America. “And it’s collaborative, so we could point to things on our screen, draw an arrow or circle something. And the user on the other end sees that and they can do the same thing. It’s a really collaborative experience that basically allows us to troubleshoot in real time with the customer.”

The primary use case is for building professionals to more quickly resolve product glitches, either on the phone or with only one site visit by a technician. Ben Tredwell, director of project management at Patterson Custom Homes, tried out a demo of the tool with his team. While he typically does not experience issues with JELD-WEN products during construction, he says he can see the benefit of the app. “It would save time by having direct communication with the manufacturer’s representative and getting replacement parts ordered more quickly than going through a third party,” he says.

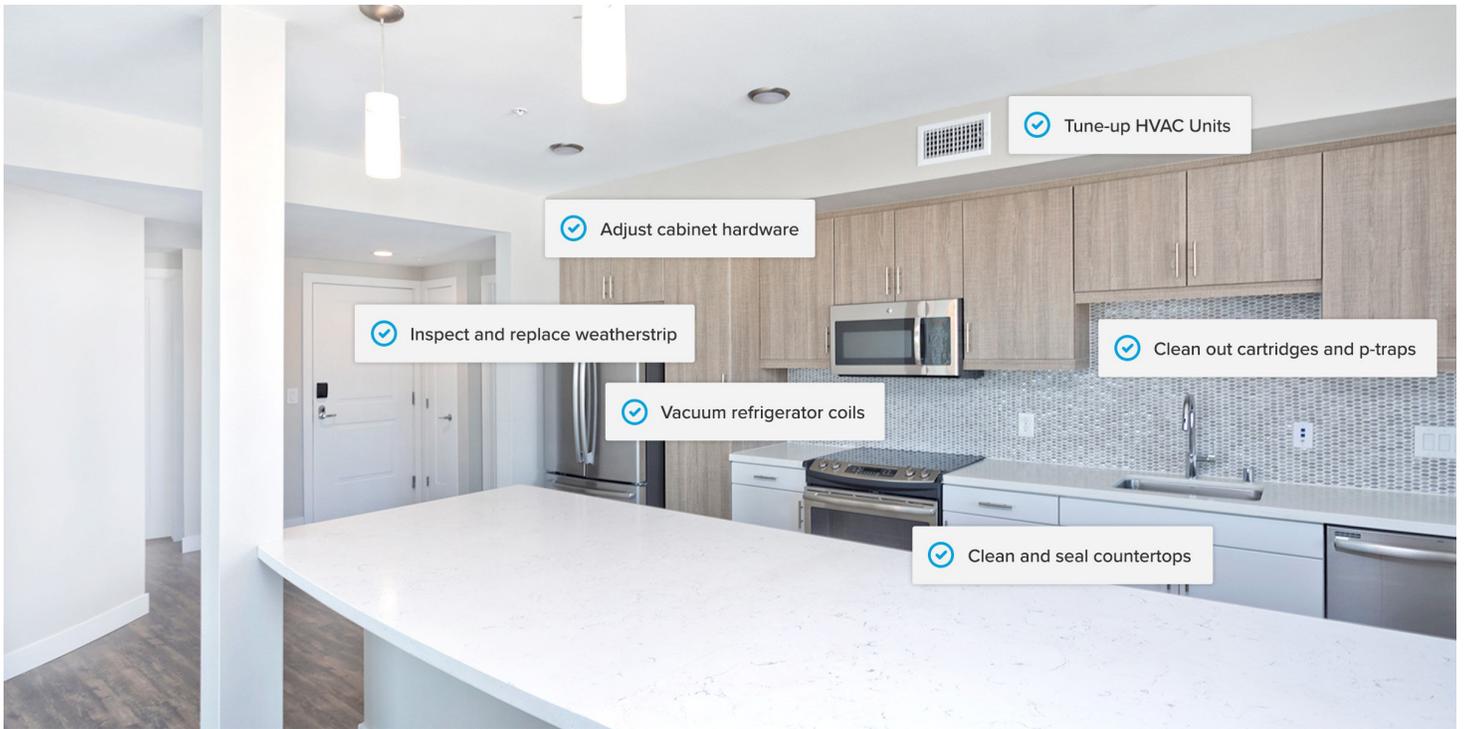


Pros can use the OnSite app to collaborate with a JELD-WEN technician using the pro’s tablet or phone camera.

The goal, Wollemann says, is for pros to feel fully supported, like JELD-WEN is there on the job site with them. And by choosing suppliers with dedicated support like JELD-WEN, building pros can enhance their own clients’ experience. Amidst the pandemic, with field service suspended, JELD-WEN has been offering OnSite support directly to the end consumer. That results in fewer appointments for the homeowner and fewer interruptions to their workday. “We know that oftentimes the builders and contractors are influential in choosing the building product,” Wollemann says. “So having a smooth service experience afterward, I think that reflects well on the builder.”

Leaving a lasting impression

The Patterson team can also imagine applications for the OnSite tool after the sale because it’s a perfect fit with the builder’s long-term, preventive home maintenance program called Custom Care. It’s a proprietary software program that takes a home’s specifications and develops a suggested maintenance program. Homeowners are automatically reminded when systems need service, and they can easily email Patterson’s customer care manager or get quotes and schedule service from subcontractors through the digital interface.



Patterson's [Custom Care program](#) creates an annual maintenance calendar for clients, allowing them to schedule service appointments through an interactive portal.

Patterson currently performs an annual door and window inspection to identify any issues and parts or repairs that are needed to keep the units functioning like brand new, so a program like OnSite could help the builder identify and expedite parts and repairs needed. After a pilot program, JELD-WEN is testing an initial launch of the OnSite program with Lowe's in July 2020.

For Patterson, the Custom Care program provides a lasting reminder of the entire customer experience lifecycle, cementing clients as brand advocates for the Patterson family. The builder has held parties in the past for all of its Custom Care clients to celebrate the program, network and make new friendships, and learn about new services.

Patterson's homes have even become more desirable upon resale as the builder has gained a reputation in the community for standing by its homes even after the homes transact. Those resale buyers get a taste of being part of the family, even without having gone through the custom home building experience.

"They buy the home still having that peace of mind and knowing that we're there to take care of it," Newman says. That second-hand word of mouth goes to demonstrate the power of customer experience to leave clients with the emotional glow of satisfaction—and to turn them into evangelists for your brand.

For More Information

To get help with your project, [contact JELD-WEN.](#)

To access professional content and resources, [visit JELD-WEN's Pro-Site.](#)