



WATERMARK

CASE STUDY

Focus Real Estate: CRM Success

Results:

Average increase of
14.5%
in sales productivity

12.2%
reduction in
marketing overhead

Who is Watermark?

Our award-winning designers, content creators, and web developers, led by our client-first account team, thrive on innovation and creativity—and the data that drives results.

We treat each client as an individual, not just another company. That's why we form personal and lasting relationships with our clients—the perfect blend of expertise, imagination, and innovation!

Our B2B marketing solutions help you engage with customers, differentiate your brand, and nurture business growth.

At Watermark, we partner with your team to bring digital marketing and development expertise that helps you exceed internal business metrics. We guide and implement best practices using data-driven solutions—and inbound marketing methodology—that help ensure your company flourishes.

The Challenge

Focus Real Estate needed an automated CRM strategy, but as a successful and busy Real Estate Firm, the internal team's limited bandwidth and skill gaps made it difficult to accomplish this in-house.

They needed a digital Inbound marketing agency with the knowledge and experience to offer tailored solutions to their CRM needs

Who is Focus Real Estate?

Joe Phillips, who had started his own real estate company, decided to focus on selling homes in Central Park, Colorado.

He has built a reputation for being friendly, approachable, and reliable, so it was natural for his new venture's brand to reflect those characteristics.

He hired Watermark, a local digital marketing agency with deep roots in the Central Park community, to develop his brand and logo—"Focus Real Estate"—setting it apart from other companies in its highly competitive market.

Watermark designed collateral for each of Joe's markets and developed an award-winning website with custom IDX integration to provide Focus' clients with the most up-to-date housing market information.

Focus' reputation as a successful real estate company has led to its growth. To continue that success, Focus must add new agents and clients—and the resulting increase in administrative tasks could bog down the internal team if not managed correctly.

Once again, Focus looked to Watermark to help them streamline the increasing administrative tasks associated with their expanding contacts list and need for internal visibility.

The Problem: A Growing Business Means Changing Processes That Are No Longer Efficient and Stalling Your Sales Team

(A VERY GOOD PROBLEM TO HAVE, BUT A PROBLEM ALL THE SAME)

Here's a deep dive into the **Challenges** Focus Real Estate faced, the Solutions Watermark offered and how we turned strategy into **Results**:

Focus Real Estate, a well-known community business active in networking events and building relationships with local businesses, has created more contacts and leads thanks to its outreach.

Focus Real Estate needed an automated CRM strategy, but as a successful and busy Real Estate Firm, the internal team's limited bandwidth and skill gaps made it difficult to accomplish this in-house.

They needed a digital Inbound marketing agency with the knowledge and experience to offer tailored solutions to their CRM needs.

They needed Watermark.

MORE OUTREACH + MORE CONTACTS AND LEADS + MORE CLIENTS LOOKING TO BUY OR SELL A HOME = A PLEASANT DILEMMA: HOW TO ACCOMMODATE MORE CLIENTS IN THE SAME AMOUNT OF TIME.

The Solution: CRM Automation

Focus Real Estate already had a foolproof process of helping clients buy and sell houses but needed to improve its CRM strategy and sales pipeline. To do this, Watermark helped the Focus team:

- Build and manage automated workflows to move customers through buying and selling
- Distill prospect and customer data and turn that into a personalized workflow Close more deals by automating specific stages within the sales process
- Streamline internal and client communications with automated notifications, reminders, and email triggers
- Use automation to cut down on mundane, tedious tasks like writing and sending multiple emails a day
- Create template contracts to increase efficiency and brand consistency

How Focus Real Estate and Watermark Worked Better Together

Given its ties to the Central Park community, Watermark understood the unique needs of Focus Real Estate and partnered with them to craft custom solutions to automate the sales process, increase and align internal team communications creating visibility and consistency across the entire team – saving time spent on repetitive tasks and lowering administrative/overhead costs.

“THE TEAM AT WATERMARK HAS BEEN VERY HELPFUL IN CREATING OUR WEBSITES AND HELPING US UTILIZE AUTOMATION IN OUR PROCESSES. FOR EXAMPLE, WHEN A PROSPECT FILLS OUT A FORM ON OUR WEBSITE THEY ARE AUTOMATICALLY PUT IN THE RIGHT SPOT IN OUR DATABASE THEN THEY’RE SENT A 5 EMAIL SEQUENCE THAT FITS THEIR SPECIFIC NEEDS. BY THE TIME WE SPEAK WITH THEM THEY’VE ALREADY HEARD FROM US AND RECEIVED A TON OF VALUE. IT DEFINITELY MAKES THE SALES PROCESS MUCH EASIER.”

- JOE PHILLIPS, OWNER FOCUS REAL ESTATE

The Implementation: Turning Strategy Into Results

Here’s a deep dive into the **Challenges** Focus Real Estate faced, the **Solutions** Watermark offered and how we turned strategy into **Results**:

The Challenge: Lack of Time to Sell

Focus Real Estate’s agents needed:

- More time to focus on client specific information and less time processing contracts and repetitive tasks.
- More time to focus on closing deals and less on following up with leads
- A process to automatically nurture prospects through a series of workflows
- Close more deals by automating specific stages within the sales process

THE SOLUTION: AUTOMATED WORKFLOWS

Build and manage automated workflows through Hubspot’s CRM software to move customers through buying and selling.

HOW WE DID IT

Using Hubspot’s CRM and Marketing Automation Platform, Watermark worked with Focus Real Estate Team to build automated yet customized workflows that would guide customers through the buying or selling process at Focus.

THE RESULTS: MORE TIME TO FOCUS ON SALES

Watermark’s solution for building and managing automated workflows saved the sales team more time but kept the customized, personalized approach that Focus is known for.

The system also helped focus the team’s efforts on generating new leads and listing inventory, which let them increase productivity without taking more hours out of the day.



The Data: Time is Money

For context, according to Forbes, The average sales rep spends about 65% of the workday on non-billable tasks, which means only 35% is left for actions directly related to selling.

Let's break this down further: It's reported that Sales development representatives perform include an average of 94.4 daily activities:

- Writing and sending 36.2 emails (38%): If the typical email takes around 10 minutes to manually write and send and if a salesperson was writing and sending an average of 36.2 emails that's 6 hours on average
- Making and answering 35.9 phone calls (37%)
- Leaving 15.3 voicemail messages (16%)
- 7 social media touches (7%)

This averages out to a typical sales rep spending just 14 hours a week engaging with prospects and managing existing accounts—or about 28% of the typical workweek.

Before implementing Watermark's automation solutions, Focus Real Estate didn't have any automated workflows. After deploying the new system, 80 workflows were active—with each containing around 7 emails. These emails were set to automatically trigger leads who had expressed an interest in buying or selling a home during particular stages of the process.

Watermark migrated current client data and information to the robust and multifaceted CRM platform Hubspot. After the Watermark team set up and trained the Focus team on how to use their new CRM, Focus Real Estate's sales reps implemented automated workflows for their inboxes, they got back an average of up to 6 hours to spend on actual selling activities.

An added benefit?

Through the personalized training the Watermark team provided to Focus Real Estate, its sales, marketing, and administrative teams could take over many functions normally performed by sales reps.

Additionally, triggered responses to email queries set meetings for these teams automatically—saving both time and administrative costs, resulting in an average increase of 14.5% in sales productivity and a 12.2% reduction in marketing overhead.

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The Challenge: Lack of coordination among internal communication channels

Focus Real Estate needed a way to align internal team communications creating visibility and consistency across the entire team.

The Data: Efficiency = Consistency

Based on Zapier data, the Focus Real Estate team **saved an average of 25 hours per week** using automation. These are the most common tasks that were automated:

- Team communication
- Identify and target customers
- Schedule email sends
- Send tailored messages
- Manage subscriber database
- Notifying team of events

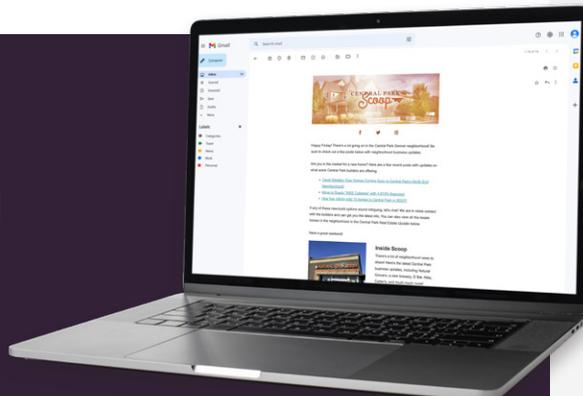
Let's Focus On The Big Picture

Since Focus Real Estate implemented Watermark's CRM automation strategy, the company has enjoyed these benefits:

- 1,080 Sales Deals Created
- 599 sales deals closed with 340 or 57% of them won
- Nearly 4,000 contacts have entered into lead nurturing workflows
- Workflows kept contacts engaged for as long as 2 months with up to 7 emails sent automatically to each individual
- Focus Real Estate has saved an average of 220 hours a month by automating administrative and sales tasks, leading to increased efficiency, productivity and decreased spending on non-billable work

1,080
sales deals created

57%
of deals won



THE SOLUTION: STREAMLINE COMMUNICATION WITH AUTOMATION

Watermark worked with the Focus team to develop a customized solution that leverages all of their CRM's automation benefits and features through Hubspot.

HOW WE DID IT

Watermark gave Focus Real Estate the tools and training to:

- Streamline internal and client communications with automated notifications, reminders, and email triggers
- Create template contracts to increase efficiency and brand consistency

THE RESULTS: ORGANIZED AND INFORMED

Focus Real Estate has been using the Hubspot CRM Watermark helped build and manage for them for over 5 years, and they are thrilled with the results! They use it to send automated emails based on events such as signing contracts or reaching milestones in the buying process. This helps them to stay organized and keep their clients informed about what's happening next in the buying process.

They also use Hubspot for templates for everything from contracts to marketing campaigns. This saves them time when they need a new contract or campaign created quickly because now all they have to do is fill out the template and edit it once it's ready for use!

Do you want to see these numbers in your company?

WITH WATERMARK'S CUSTOM SOLUTIONS FOR CRM AUTOMATION, IT'S POSSIBLE!

Here's how to get started:

Step 1: Educate yourself

If you haven't already, enroll in our CRM video series, where we'll guide you step-by-step into implementing the tactics that have been proven to work for Watermark's digital Inbound clients – our gift to you.

[Register Now](#)

Step 2: Explore Our Resources and Solutions

Watermark only succeeds when our clients succeed. That's why we continually offer a wealth of exclusive digital marketing solutions for FREE to anyone who visits our site.

[Check Out Our Blog](#)

[Check Out Our videos](#)

Subscribe to our monthly newsletter to stay in the know about all things marketing:

[Join The Drip Newsletter](#)

Step 3: Test the waters—Find out if Watermark is the perfect digital marketing partner for your B2B needs

With watermark, it's never a one-size-fits-all approach. Our solutions are customized for each client to align with their targets and goals, not our bottom line.

Sign up for a FREE discovery call with our CRM expert, who can help identify the solutions uniquely tailored to solve your company's sales funnel and workflow challenges.

[Schedule an Intro Meeting](#)

READY FOR MORE?

Did you know we don't just offer solutions for CRM? At Watermark, we don't silo projects based on one goal. We believe that an omnichannel, Inbound approach will help our clients succeed in the long run. Explore our Inbound approach today.

[Inbound Solutions Page](#)

GOT QUESTIONS? WE'VE GOT ANSWERS!

Not ready to commit to a meeting? We get it! Simply fill out this form with your questions, and we'll get back to you with an answer A.S.A.P.

[Schedule an Intro Meeting](#)