

MARKETING YOUR MANAGEMENT COMPANY

THE ULTIMATE GUIDE



PART 4:

Brand ADOPTION



CINC
systems

**"It takes months to
find a customer, and
seconds to
lose one."**

Vince Lombardi

In the first three installments of the Ultimate Guide to Marketing Your Management Company, we focused on creating a brand identity, defining a target audience, attracting the right audience to your brand and acquiring your dream client. But none of this matters if you can't keep them.

In this guide, we'll review top considerations in a digital world to build client retention and transform a customer into an evangelist. We'll break down how customer service and retention is affected by a digital world and the tools you need to drive communication, engagement, and stickiness.

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A hand is shown holding a heart-shaped sticker on a wooden surface. There are four star-shaped stickers in a row above the heart. The background is a teal-colored wooden texture.

TRANSFORMING CUSTOMERS INTO EVANGELISTS IN 2021

IN MANY WAYS, CUSTOMER RETENTION IS ONE OF THE HARDEST FACETS OF THE JOB FOR AN OWNER OF A COMMUNITY ASSOCIATION MANAGEMENT COMPANY.

An HOA board is constantly churning, and with that churn comes a new crop of eager board members looking for a quick win.

So how can one create a strategy that turns customers into evangelists to ensure their newly elected board members never once consider the thought of switching management companies? How is customer service affected by a digitally-consumed client base?

And in a world where information is everywhere, does brand loyalty even exist?

F O S T E R I N G E V A N G E L I S M

An evangelist is someone you've won over so completely that they espouse your goods and services to everyone they know. This is more than the person who fills out a super positive feedback survey, or leaves a five star review on Facebook. When they run into acquaintances and former colleagues at a conference they say, "don't forget to stop at this booth, they completely changed my work life!" They share success stories to their own social media and tag your business page, thanking you for everything you provide. These are the people you are striving to create with the last phase of your marketing.

This is especially true in the Community Association Management (CAM) industry. By definition, this industry sees a lot of internal movement - homes are bought and sold every day! This means people get to experience a lot of different choices. Sometimes current homeowners become board members a few years into your time with the community, meaning you may have to re-win over a frequently-changing board of directors. Or it can mean a homeowner or board member moves to a new community and recommends your management company. In the end, there is a massive benefit to making an evangelist out of every single person in each of your communities.

Creating evangelists is about making your current customers feel effortlessly supported in all of their needs. Here are five ways to foster evangelists in the year 2021 and beyond:

**F O C U S N O T
J U S T O N
C U S T O M E R
E X P E R I E N C E ,
B U T O N
E M P L O Y E E
E X P E R I E N C E .**



Customer Experience (CX) has been a major marketing focus for over a decade. This emphasis has paid off for the client and their end-user experience, especially when it comes to digital engagement. But we're forgetting something if we're only considering the customer. We're forgetting that there is a direct correlation between customer satisfaction and employee satisfaction. Employee morale is a key component to building evangelists, and driving morale can be achieved by prioritizing empowerment, efficiency, and effectiveness.



EMPOWERMENT

Employees should feel empowered to make decisions on their own - at least ones that aren't major strategic shifts within the organization. If a homeowner calls with questions about a violation, they should be able to pull up the information quickly and feel comfortable discussing with the homeowner. Other ways to empower employees include providing autonomy over assignments and giving constructive feedback after the assignment is complete. Be sure to recognize your team for their effort and results as well on a regular basis.

EFFICIENCY

Technology should improve a work experience, not hinder it. Clunky systems that consistently time out will easily frustrate an employee, especially when they are trying to resolve customer issues. Investing in tools that improve ease and productivity for your team will enable them to not only work faster, but be more satisfied with their work.

EFFECTIVENESS

Through regular training and a clear understanding of the company's mission, vision and goals, employees are able to bring more ideas and actions to the table that drive results. Focus on regular training and development for your team, including the guides that CINC offers (such as this one!)

CREATE AN OMNICHANNEL APPROACH TO COMMUNICATION

The term 'omnichannel' is a fancy way to say that you need to be everywhere to connect with your customer. It means providing a seamless and consistent experience for your client across a variety of channels.



In 2021 and beyond, an omnichannel approach means means providing the ability for your client to converse with you in the platforms that they prefer. Whether it's text, email, phone or WhatsApp, conversations need to be conducted on their terms.

An omnichannel approach isn't just about direct one-on-one communication, either. During Brand Attraction Week, we discussed the importance of online reviews in building your company's brand presence and reputation. Review management plays a crucial role in customer service success, and a company that is responsive to both positive and negative reviews will be viewed as a customer-centric brand.

CREATE A PERSONALIZED EXPERIENCE FOR THE HOMEOWNER

For years, consumers have grown accustomed to hyper-personalized advertisement. If one looks at a bed set online but doesn't buy anything, that very bed set will appear in their Instagram feed later that night.

Because we've adapted to personalized advertisement, we now expect personalized approaches to everything we experience in a brand - from marketing to service.

It's easy to consider what personalization means from a digital marketing perspective - from dynamic email content to retargeted messaging, the list of possibilities goes on and on. From a service perspective, personalization is all about creating an environment in which the client feels they are at the center of your universe as you're interacting with them. There are many ways to create a personalized approach to service that builds retention.



SAY HELLO - IN PERSON AND DIGITALLY

Take advantage of dynamic digital features to greet a customer by their name when they open their app or receive an email from you.

SHOW THE HUMAN SIDE OF YOUR BRAND

Put a face to the name on your website and your email signatures, and utilize social media and web content to showcase behind-the-scenes moments from your team. If your boards see your team completing a charity event or trying the latest TikTok trend, they'll feel like they better know the people behind the company.

KNOW YOUR CLIENTS' HISTORY

When your Property and Community Managers are out in the field, they should take a moment to review the latest updates within their residence. Perhaps there was a homeowner who just had a major renovation completed, or perhaps the board just completed a charity event the prior week. You may even know of a homeowner who has recently given birth or had a child graduate college. By continuing the conversation beyond the list of to-dos, you're developing a connection with your communities that solidifies customer evangelism.

ASK FOR FEEDBACK

Whether it's through an online review or a survey you build on your own, asking the client for feedback about your interaction will show that you are striving to create the best experience for them.

USE TECHNOLOGY TO BE PROACTIVE IN YOUR APPROACH



With such an abundance of digital efficiency and automation in our world, clients expect that their needs are not only met, but anticipated. While it's impossible to alleviate a company from all mishaps, many negative experiences can be proactively prevented through technological enhancements. To determine what makes the most sense for your company to develop a proactive approach, consider the following:

- **What is the biggest waste of time for your team?**
- **What are their most repetitive tasks?**
- **What are the most common complaints you receive from boards and homeowners?**
- **Can these inefficiencies be improved through technological investments?**

After completing this brainstorm, consider if your software solution already has tools to help alleviate these pressures, but your team hasn't taken advantage of such features. If you don't have an available solution, consider the opportunity costs associated with keeping everything business-as-usual versus business better-than-usual.

MAKE SERVICE SCORES A TOP KPI IN YOUR COMPANY



Finally, it's time to look at your goals for the company. You probably have written down your plans with respects to acquisition and profit. But have you built KPIs around your satisfaction scores from your boards and homeowners, and would you even know where to start?

By developing a numeric goal towards service, you are putting retention as a top priority within your company and you are aligning your team with your customer retention goals. There are numerous ways you can measure service within your organization, and it would be easy to go down a rabbit hole into various calculations. However, you can keep things simple by developing a Net Promoter Score.

A Net Promoter Score is an annual score one would obtain from their boards that would simply answer the question, "How likely are you to recommend our association management company to a board?" High responses indicate higher levels of satisfaction with one's experience.



To start an NPS process, you can deliver a survey to your clients to get an initial read (many tools such as SurveyMonkey offer out-of-the-box NPS templates for you to use very easily.) From there, determine a goal for the following year based on what you feel is reasonable and achievable. The commentary you receive from your negative promoters will help you understand the key focus areas for your team. For a simple template to use to start the NPS process, take a peek at this [template from SurveyMonkey](#).

E V A N G E L I S T S A R E B U I L T T H R O U G H S E R V I C E .

Oftentimes when we think of creating value to build customer loyalty, we emphasize service during the initial sale and onboarding process. While these are crucial moments in the relationship, they are often not the moment in which a customer becomes an evangelist. Loyalty happens when a customer service issue is resolved. If a client has a tremendous experience when a problem was handled for them, they will become lifelong champions of a brand. On the flip side, 70 percent of customers will lose all brand loyalty after just one negative experience. That's why it's so important to understand the latest trends in service and retention and consistently apply strategies and tactics within your team to drive efficiency and service within your associations.

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MOBILE FIRST

HOW MOBILE
APPLICATIONS CAN DRIVE
CUSTOMER LOYALTY
AMONGST HOMEOWNERS
AND HOA BOARDS

WHEN IT COMES TO COMMUNICATION, YOUR CUSTOMERS
EXPECT YOU TO BE WHERE THEY ARE.

They have no intentions of changing their communication behavior to adapt to your company; if you want to keep them as a customer, they expect you to adapt to them.

The key to a strong omnichannel communication approach?

You guessed it - your phone.

What is a Mobile- First Strategy?

When was the last time you logged into Facebook or Instagram from your computer? Unless you are in digital marketing or have to regularly review social content for your work, you are probably scrolling through social media on your phone while you're sprawled out on the couch - not when you're sitting neatly in front of a desktop. Now imagine if a social media company that you regularly consume developed a product that looked really good on your computer, but terrible on your phone. You'd be shocked, right?

This is what we mean by a mobile-first approach. In web development, a mobile-first strategy is one in which the mobile-enabled version of the website is given priority over its desktop version. This is often seen in social media portals as well as most E-commerce companies.

So what does this mean for you? When we think of the ways in which Property and Community Managers work, we consider a mobile-first approach as one that gives priority for completion of day-to-day tasks on a mobile device over a desktop. The same rule applies with homeowners and board members - we consider how our clients will be using our products on their phones over their laptops.

WHY GO MOBILE-FIRST? LET'S LOOK AT THE STATS:



MILLENNIALS SPEND ON AVERAGE 40 MINUTES A DAY ON THE INTERNET WITH THEIR SMART PHONE, VERSUS 24 MINUTES A DAY FROM THEIR BABY BOOMER COUNTERPARTS (THAT'S 66% MORE TIME.)

This means that mobile usage for everyday tasks is only bound to grow within your communities.



TWO THIRDS OF INTERNET USERS SHOP THROUGH MOBILE APPS.

If two thirds of your residents are already accustomed to shopping via an app, perhaps they'd easily become accustomed to paying their HOA fees and managing other needs via your own app.



60% OF CONSUMERS SAY THAT THE ABILITY TO SHOP VIA MOBILE IS AN IMPORTANT CONSIDERATION IN BRAND SELECTION.

These same consumers may be board members considering the mobile capabilities of various association management companies.

MOBILE-FIRST AND BRAND LOYALTY



You may be wondering how a mobile-first approach can help transform customers into evangelists. Here are just a few ways in which mobile-first can drive loyalty:

MORE PERSON-TO-PERSON CONNECTION

If Property and Community Managers complete everything on their phone while they're out in the field, they can spend more time with board members and homeowners and less time in the office.

FASTER COMMUNICATION

A text message or app notification takes far less time to consume than a voicemail or letter. Sending out important updates such as updated COVID-19 protocols through mobile communication increases speed and transparency, further building trust.


SELF-SERVICE CAPABILITIES

When everything a homeowner needs to know is on one mobile dashboard, they are able to easily self-manage through the bulk of their needs. This in turn can drastically reduce the time your team is spending answering questions that are focused on tasks over building rapport.

BOARD TRANSPARENCY

Volunteer board members don't want to sift through papers or dig through inboxes to find invoices and budgets. Having the info on one app makes a world of difference.

HOW TO BUILD YOUR MOBILE- FIRST APPROACH



You may feel ready to go mobile, but you may not know where to start. Here are a few ways you can start the mobile-first conversation with your team and move forward as one:

1. TAKE A STEP BACK

Review your mission, vision and WHY with your team. Change is always a scary topic, but it's usually even worse when technology is involved, so understanding the Why behind the What is vital.

2. REVIEW THE BENEFITS

Take a look at mobile applications such as CINC's Homeowner and Board App and CINC Manager app and outline the key features of these products with the team.

3. BRING IT ALL TOGETHER

Discuss how these mobile tools will help get your company to your Why and reach your goals.

4. AGREE ON A SCHEDULE

Determine times to train your internal team on mobile tools and devices, followed by discussions with your boards and step-by-step guides for your homeowners.

5. MARKET MOBILITY

Implement a prelaunch and launch strategy to excite and delight.

WORKSHEET

Homeowner App Custom-Designed Marketing Material

A strong prelaunch and launch campaign will deliver superior results in the adoption of your Homeowner and Board App. Use the below customizable marketing materials to get started.



Powered By **CINC** systems

Prelaunch

- [DOWNLOAD FLYER >](#)
- [DOWNLOAD EMAIL >](#)



Powered By **CINC** systems

Launch

- [DOWNLOAD FLYER >](#)
- [DOWNLOAD EMAIL >](#)

03/⁰⁴

YOUR PORTALS TO SUCCESS

HOW YOUR MANAGEMENT COMPANY CAN USE THE CINC PORTALS TO MARKET YOUR SERVICES AND BUILD BRAND SATISFACTION

It's important to remember that your marketing efforts don't stop the second you close the deal - not if you want to be wildly successful, at least. Marketing is more than a funnel to a sales pipeline or tactic. It's the art of seducing, securing, and retaining business. But you don't use the same kind of marketing for a won client as you would for a brand new prospect. Client retention is about maintaining happiness and creating stability for your customers, and turning your customers into your evangelists. We find that one of the best tools in your arsenal to help build customer loyalty and foster evangelism is your customized web portal.

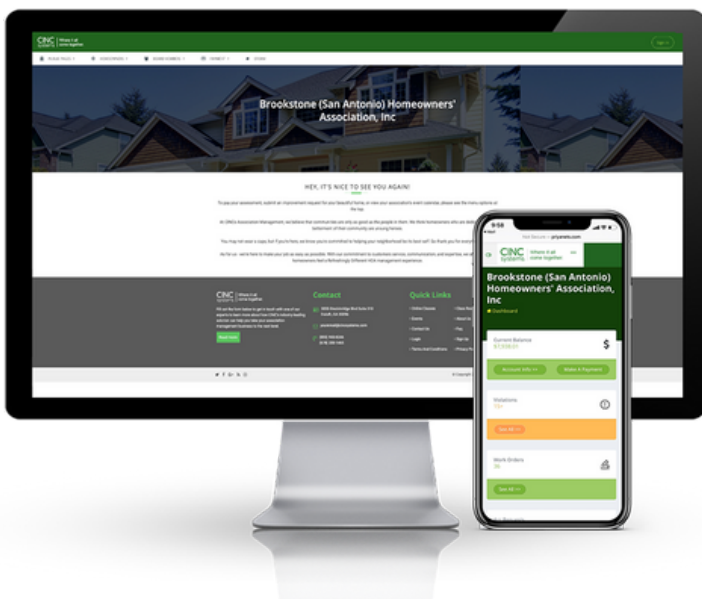
THE CINC MARKETING ADVANTAGE



While partnering with CINC has many features to edge out your competition, one of the strongest tools in your marketing toolbox is our Web Portal. This portal is the nexus of communication between your management team and your board members and homeowners.

Now this might not sound like a massive marketing opportunity, but don't be fooled. CINC's Web Portal provides support, stability, and ease of mind for your board members, and that is what will sell them every time, again and again.

CINC clients have an advantage over other management companies because the CINC portals are so robust. Here are some of the ways existing CINC customers are able to leverage the portals to help their clients:





BUILDING VALUE

“CINC solves the problem of reporting to the Board. Many times managers get so busy getting the job done that it’s hard to take the time to report their actions to the Board. Board Members are often only involved at a meeting and do not fully realize all of the work the manager does to maintain the community. The benefit of the Board being able to see violations, ARCs, and work orders on the website is that they can better appreciate the value of the management company.”

• Kelly H, Management Company President

PROVIDING ACCOUNTABILITY

“The homeowner portals have been huge for us. Not only has it given us something that we weren’t able to offer our customers before, it gives our board members so much information, along with our homeowners. It’s kind of a Catch-22 though because the board members are actually able to go online and see exactly what we’ve done. So there’s no question - we’re not getting like we used to ‘Hey, how many times do you go out on the property?’ because they go on there and they see on the portal, how many times we’ve gone out, done violations. They have copies of the violations, with photographs so there’s no questions.”

• Avelino Vide, Avid Property Management



EXPANDING ACCESSIBILITY

“CINC websites really transformed our office into a 24-hour a day office. So the board members are able to go online and access reports, for example, mid-month before their meeting, and see exactly what work orders have been done. They can check out the accounting status, they can look at violations, and it really helps keep them up to date. It’s also great for our homeowners because with the websites they can integrate with our office virtually from anywhere when they’re on vacation. We have a lot of communities that have military people, and they pay their bills on the community website from Afghanistan.”

• *David Priestley, Priestley Management Company*

INCREASING PROFITS

“Our homeowners like the website, having the data right at their fingertips, being able to pay online, seeing their account 24/7, know what they owe, do any number of things for their association at any time, without having to pick up the phone and call our office. And all of these things go into one big package, which adds value to my company as a whole and makes us more profitable.”

• *Derek Greene, Community Association Management*

PUTTING IT TOGETHER IN CINC

CINC's Web Portal is built with management companies in mind. The customization that's available gives each company the freedom to choose what their most important content is, and helps align the look and feel across the board. With the ability to customize colors to match your branding, manage the exact structure of your menus, and a full range of graphical support, your Web Portal will help you present a unified approach for each community association in your portfolio.

You also have full control over what your pages are used for, and who has access to each of them. Your menu isn't just a preset handful of commonly used pages; it's completely specific to your needs and the needs of each of your communities

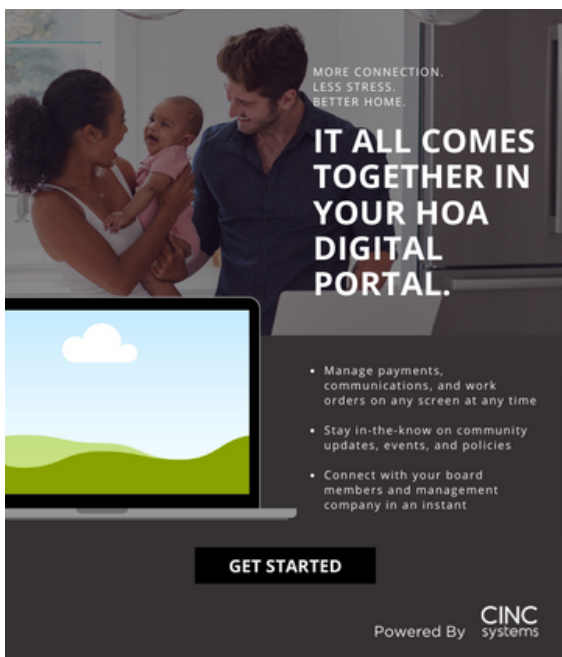
And as a bonus, if you really want to dive in and get your hands dirty, you can even create custom content using your own HTML code. CINC's Web Portal is a massive opportunity to help your management company retain and re-win your clients and members on a daily basis.



WORKSHEET

Marketing Your Portal

Use the below tools to create customizable marketing assets to showcase your online portal and online payment options through CINC. To use these assets, you'll need a Canva account.



MORE CONNECTION.
LESS STRESS.
BETTER HOME.

IT ALL COMES TOGETHER IN YOUR HOA DIGITAL PORTAL.

- Manage payments, communications, and work orders on any screen at any time
- Stay in-the-know on community updates, events, and policies
- Connect with your board members and management company in an instant

GET STARTED

Powered By **CINC** systems



Payments made on **any screen at any time.**

What happens when you pay your HOA fees online? In a nutshell: it's just easier.

- Avoid missing a payment through automated monthly billing
- Manage everything on the go through faster, more efficient tracking and confirmation
- Keep home life organized in your online dashboard and quickly connect with your board members

GET STARTED

Powered By **CINC** systems

Digital Portal

[DOWNLOAD FLYER >](#)

[DOWNLOAD EMAIL >](#)

[DOWNLOAD TWO-PAGER FOR PROSPECTS >](#)

Online Payments

[DOWNLOAD FLYER >](#)

[DOWNLOAD EMAIL >](#)

04/04



USING MASS COMMUNICATION

LEARN HOW YOU CAN ADAPT THE
MASS COMMUNICATION
FUNCTIONALITIES IN CINC TO
SPREAD YOUR MESSAGE TO YOUR
CLIENTS AND HOMEOWNERS

Unlike retail businesses, where you win a client's business once and the transaction is done, our industry is unique in that boards change every few years. That means every time there is a new election, you are stuck in the position of re-winning your client's business.

One of the best ways you can win new board members over is to start that process from day one when they become a homeowner in your community, and never stop. That's why communicating with your homeowners is one of the most important marketing tools in your toolbox.

USE EXISTING COMMUNICATION TOOLS TO MARKET TO YOUR CLIENTS

EMAIL SIGNATURES

Your email signature is a great way to introduce simple marketing to every single homeowner or board member you communicate with. Consider using a signature template that is consistent across your organization so every employee promotes the company when they send an email.

PHONE GREETING

Similar to email signatures, your phone greeting is something that you can standardize to add a marketing message to your business. Encouraging all employees to answer the phone in the same way provides consistent messaging for your brand. (For example, if your company slogan is 'Every Day is a Great Day with Management USA', ask employees to answer the phone that way.)

VOICEMAIL/HOLD MESSAGING

You can pre-record messaging to promote your brand's value proposition as part of the greeting, or as mini 'commercials' that interrupt hold music.

YOUR MGMT COMPANY WEBSITE

Your website is one of the very first impressions you'll ever get to make on a new prospect, but it's also an opportunity to win over your existing clients when they visit. It's vital that your marketing and branding efforts be clean, consistent, and clear on your company website. But more than that, it's important to get your messaging across in the right way. You should be using this space to re-win your current homeowners. Testimonials and content that emphasize your values are great ways to use this space to appeal to communities you already serve.

THE COMMUNITY'S WEBSITE

A community website is more than just a place to keep your governing documents; it can be a marketing powerhouse if you know how to use it. This space is prime real estate to share your brand messaging with your homeowners and showcase how you are meeting that mission for them.

Don't have a website? CINC's Web Portal can fix that.



USE EXISTING COMMUNICATION TOOLS TO MARKET TO YOUR CLIENTS

COMMUNITY NEWSLETTERS

If your community publishes a newsletter, use that opportunity to showcase the efforts your management company is making on the community members' behalf. Praise the efforts of individual community members and emphasize the teamwork and efforts you are going through to make their lives better.

YOUR HOMEOWNER PORTAL

Like we mentioned earlier, your homeowner portal is a great place to unify your branding. CINC's Web Portal gives access to homeowners and board members alike, with plenty of customization capabilities built to give your management company a leg up above other community websites.

MONTHLY STATEMENTS

Do you send out statements to homeowners each month? A line or two of text telling homeowners how much you appreciate them or sharing ways they can connect can help to show them they matter to you.

MASS EMAILS

Mass email is an effective time-saving marketing option for broad communications. Through mass email, you can communicate to all of your client members at once. Use mass email for more than just announcements or to distribute bad news - show your members the efforts that your company is making to live up to your mission and values. Doing this reinforces your brand's message and reminds clients why they chose you in the first place. CINC's Broadcast Emailing gives you access to a tool that offers a full suite of customizations like adding images, font options and more that will help get your message out in an attractive and brand-consistent way.



USE EXISTING COMMUNICATION TOOLS TO MARKET TO YOUR CLIENTS

MASS TEXTING (SMS)

Text messaging is such a great tool for your community outreach, and is only going to become more and more useful. As newer and younger generations begin their journey into homeownership (and board membership as well), they're going to expect a certain level of immediacy in their communications. Being able to send your management company's important updates straight to their cell phones is a great tactic for more than just community announcements. It's a gateway back to the internet, so you can send links to review websites, social media posts, and your own community Web Portal. You can also just send out a warm and welcome 'thank you for choosing us!' to remind them of how much you care. CINC's Broadcast Text feature makes queuing up text messages for each of your communities quick and easy, and is the next step in reminding your homeowners about all you do for them and how much you appreciate them.

NOTIFICATIONS

Notification features are another way to get your message to the masses. One of the benefits of a notification functionality is it lives in a community-accessible place like CINC's Portal, so everyone in your community can see major announcements. Using the News Feed widget will give a continuous feed of updates you can push directly to any pages you've set the widget up on, including pages for the general public. You can advertise about the next trade show you'll be attending, new services you're going to start offering, customer success stories, and more, and your level and range of impact has the potential to be huge.

A P P E A L I N G T O Y O U R M A S S E S

Mass communication tools are more than just the bedrock of your communication plan; they're integral to the success of your long-term marketing endeavors. They allow you to consolidate big marketing efforts into often singular activities (like drafting one SMS text message for a whole community) and reach more targeted audiences than almost every other marketing tactic.



Brand Adoption



It's all about communication.

Whether it's an app notification, a text message, a community calendar or a custom-branded site, technology drives communication that fosters customer evangelism. These tools may seem like drivers of productivity, and they are - but the true benefit of a seamless tech stack from your community association management company is homeowner satisfaction and brand loyalty.

MARKETING YOUR MANAGEMENT COMPANY

THE ULTIMATE GUIDE

CINC Systems has joined forces with community association marketing agency, Frontage Marketing Group, to bring you the ultimate guide to marketing your management company.

We will be presenting this guide in 4 installments, each designed to teach you how to market your management company, and what steps you can take to build up your brand. The installments include:

- 1 Brand Affinity
- 2 Brand Attraction
- 3 Brand Acquisition
- 4 Brand Adoption

CINC Systems is the largest provider of SaaS solutions for the community association industry. Founded in 2005, CINC Systems became the industry's first Internet-based integrated accounting and property management system. CINC Systems is backed by founder Bill Blanton, a third-generation banker, and Spectrum Equity. The company serves more than 16,000 homeowners associations and 2 million homes. Learn more at www.cincsystems.com.



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