



Integrated Web Forms for Consultants - Newman Property Group

About the business

Matt Newman is the CEO of Newman Property Group, a short sale and realtor company that gives consultancy to home owners in Georgia who cannot afford current mortgage payments and need a solution to avoid property loss. Matt's work revolves around borrowers who find themselves in potential danger of foreclosure or bankruptcy to bring a clear view upon their financial prospects. The business' website invites potential short sellers to reach out for a consultation and also showcases properties currently on short sale.

Issue

In the workflow of the NPG, a primary assessment of each property and loan is essential before making actual contact with each of the homeowners. They needed to let potential sellers get in touch with the team and outline the essential preliminary facts about their situation. Matt knew that web forms were the optimum tool for collecting customer inquiries on their website. As the business is using Top Producer as their CRM system, Matt started searching for a web form solution that would not only let them create the needed forms, but also import data into Top Producer automatically.

123ContactForm solution

At first, Matt tried out a couple of starter WordPress form plugins, but wasn't satisfied of their minimalist functionality, as they failed to integrate with any CRM. Consequently, he decided to head towards a professional form building solution. The intelligent Top Producer and WordPress integrations provided by 123ContactForm convinced Matt to make the shift. With 123ContactForm, the team created user-friendly forms they placed throughout the website. All the gathered contacts are now imported into Top Producer in real time, and assigned the appropriate drip/follow-up campaign based upon their individual needs.

Tools used and overall payoff

- Sales lead forms, callback request forms, newsletter signup forms
- Top Producer integration, WordPress publishing
- Entry copy emailed to the sender, custom redirect to a webpage after submission.

From primary contact to closing sales, the NPG streamlined their entire lead management process through forms they built with 123ContactForm.

TESTIMONIAL

"We needed a way to easily allow potential customers to contact us. 123ContactForm integrates with our CRM of choice, which made it clear for us it was the right web form builder to use for our business."

(Matt Newman, President of Newman Property Group - <http://shortsalesga.com>)

Summary

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ISSUE



2

SOLUTION



3

PAYOFF

The Newman Property Group needed to collect leads and perform initial consultation on their WordPress website. They also wanted to import form contacts into their CRM, Top Producer, to be able to manage them further on.

123ContactForm offered the framework to build all the forms the team needed for collecting sales leads and taking subscribers for their newsletter. Forms are integrated, user-friendly and 100% customizable.

With 123ContactForm, the team was able to cut out major steps in the lead management process. Form tools streamline their workflow and integrate seamlessly in their existing business environment.