

The logo for SO Agency features a large blue 'S' followed by a blue speech bubble containing the word 'resi' in white lowercase letters. A thin orange diagonal line separates this from the word 'Agency' in a light blue, sans-serif font.

**S**resi / Agency

The **shared ownership** specialists

**SO** resi / Agency

**A dynamic  
team leading  
shared  
ownership**

**SO Resi is a team of property professionals, with over 50 years' experience in shared ownership, providing a fully integrated service offer.**

Our consultancy services range from new-scheme marketing intel reports, to premium sales and marketing through to post-completion customer service.

We launch, sell and market thousands of shared ownership homes annually. Our marketing generates hundreds of enquires per day, across a wide geographic region that takes in a third of the country including specialist teams working in London and the South East.

We provide agency services for charitable, for-profit housing associations, and for local authorities, offering them our specialist consultancy service and the options to utilise our market-leading SO Resi brand.





**A business  
focus with  
customers  
at heart**

**Our industry-leading sales and marketing team has a tried and tested approach for customer and client satisfaction.**

- Extensive knowledge of the shared ownership market
- Dedicated marketing, sales and customer care teams
- Detailed market intel on local demographics and buyer profiles
- Established customer brand
- Proven track record in sales and service delivery
- Tailored strategy and communication to all shared ownership audiences

★ Trustpilot ★★★★★

Google ★★★★★



# A full service offer

## **SO Resi Agency provides a complete sales and marketing solution.**

- An integrated one-stop shop of multidisciplinary resources and skills
- Tailored targeting and promotion to local and regional audiences
- An integrated communication and reporting system, providing sales leads, buyer profile, property type, price and sales progression
- A suite of SO Resi-branded shared ownership collateral
- Dedicated customer enquiry team for follow up and appointments
- Specialist sales team for remote and Covid-compliant on-site viewings with help and advice on mortgage, surveys, completion and handover
- Dedicated progression teams to support and overview administration from contracts to completion
- Specialist ongoing customer care, with guidance on home and appliance care and efficiency



# A strategic approach to marketing and sales

A tailored rationale is created for development marketing and sales, across relevant communication channels to reach the target audience – this service is tiered to suit your individual requirements, from a selective to an all-encompassing approach.

## Marketing

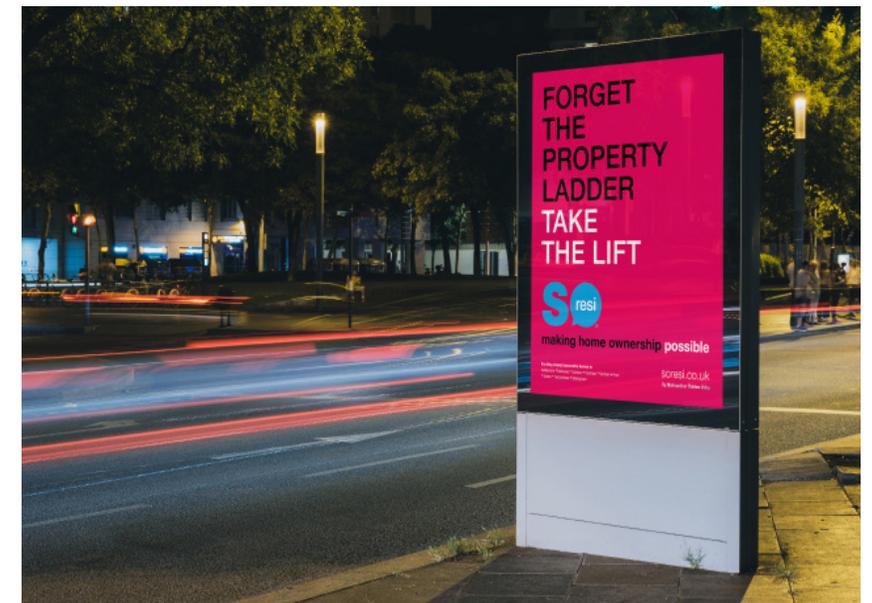
- Teaser campaigns
- Digital marketing and advertising
- Hoarding, banners, brochures, flyers, posters etc
- Microsites
- Launch events

# SO resi / Agency

## A strategic approach to marketing and sales



- A customer centric brand
- Use of digital technology





# A strategic approach to marketing and sales

## Sales

### SO Resi Agency office and sales staff

Utilising our head office as a base for all our backroom sales functions with a real focus on 'off plan' selling with the use of our bespoke salesforce CRM. With an onsite presence up and running, the sales drive becomes more focused with a sales consultant providing weekly reports to you outlining week-on-week enquiry levels and sales progress.

### Enquiries

All sales leads are handled by our dedicated customer enquiry team, with enquiries logged onto Salesforce CRM for planned follow-up and appointment setting. Our sales team arrange and host viewing days or ad-hoc viewings to meet demand, or a member can be based on-site full time.



# A strategic approach to marketing and sales

## Eligibility

Our sales team ensure that your allocation procedures are followed in line with Capital Funding Guide requirements, and that all eligibility and affordability (including any S106 restrictions) criteria are adhered to.

## Seamless customer journey

Managing customers expectations through the sales journey, providing regular build updates. Our sales teams accompany the mortgage survey, provide required CML forms and are there to congratulate buyers at completion and handover. Our dedicated progression teams work alongside your solicitors to ensure full legal packs are ready for conveyancing before the first offers are made, and oversee progress from mortgage offer through to signed contracts, exchange and completion.

## Welcome

Your buyers receive a home demonstration from our specialist team of customer care consultants, covering appliance use, and energy efficiency recommendations.



# An integrated customer journey

The customer journey is seamless and straightforward, with five easy steps to home ownership.



**ONE**  
Register  
interest



**TWO**  
Choose  
your shared  
ownership  
home and  
reserve it



**THREE**  
Mortgage  
is agreed  
following  
a credit  
check



**FOUR**  
Exchange  
contracts  
and  
complete



**FIVE**  
Pick up  
the keys to  
your new  
home



# A specialist team



**We understand that the success of a project depends on the right people, strong leadership and relevant expertise.**

We have dedicated teams with specialist knowledge and experience in the London market as well as bespoke regional teams.

With directorate leadership, a group head of sales, head of marketing and head of after sales, the team is underpinned by a full management structure. We combine specialist understanding, an entrepreneurial approach and the highest standards of client care.



# A commitment to customer satisfaction

SO Resi prides itself on exceeding customer expectations with our service and their homebuying journey – using multiple methods to ensure both complete customer satisfaction and continual improvement.

### **New enquiries**

SO Resi ensures same-day contact for all new enquiries, to capture the moment and increase the customer's excitement.

### **Sales progression**

SO Resi places increased focus on the sales progression journey.

### **Completion with homebuyers**

Before completion the dedicated sales team member will meet the buyer at their new home to carry out a demonstration of their property and the development as a whole. On completion day, the same sales team member meets the buyer at their new home, offering a welcome hamper to make sure the day is memorable and special. Following completion, we carry out a customer satisfaction survey, using the information to shape and improve our service offer.



# A commitment to customer satisfaction

SO Resi staff has been really helpful with my purchase. They have a experienced and friendly team.

Took just over a week to go from looking at a property, to having one agreed. Couldn't have been easier!

Excellent customer service. Farhia is absolutely lovely and answer all of my questions. If I could give more stars I would!

Very good experience!

We are so happy and we love the process of SO Resi!

★ Trustpilot ★★★★★

Google ★★★★★



# A leading choice

**Meeting your needs** with a dedicated team, strong leadership and a fully integrated service.

**Reaching your target market** with a full sales and marketing programme specifically designed for the shared ownership market.

**Converting sales** by looking after every customer throughout the buying process to ensure sales are completed smoothly and on time.

**Customer care** a focus on customer satisfaction throughout the purchase process and beyond with our dedicated after sales team



**A point of  
contact**

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The **shared ownership** specialists