Phase 1 – Problem Understanding & Industry Analysis

1. Problem Statement

The real estate firm currently faces challenges in handling large volumes of customer inquiries. Lead follow-up is often delayed, property visit tracking is manual, and prioritization of high-intent buyers is ineffective. This leads to missed opportunities and inefficient sales processes. A Salesforce CRM solution is required to automate lead capture, qualification, and engagement. It should also streamline property visit scheduling, provide dashboards for managers, and enable sales agents to focus on converting serious buyers.

2. Stakeholder Analysis

- **Sales Agents** → Manage day-to-day interactions with leads, schedule visits, update status, and drive conversions.

- **Sales Managers** → Assign leads, monitor agent activities, track progress, and ensure targets are met.

- **Customers (Leads/Buyers)** → Interested property seekers who expect quick responses, transparent communication, and smooth visit scheduling.

- **Executives/Management** → Require dashboards, reports, and analytics to track business growth, sales funnel, and revenue.

3. Business Process Mapping (As-Is)

1. Leads arrive from website, social media, or offline campaigns → Logged manually in Excel sheets.

2. Agents reach out via phone/email → No structured way to track conversations or outcomes.

3. Property visit details → Recorded in paper registers or WhatsApp groups.

4. Managers rely on weekly updates from agents → No real-time visibility of lead funnel or performance.

5. Lack of centralized system → Data duplication, missed follow-ups, and poor reporting.

4. Industry-Specific Use Case Analysis (Real Estate)

- **Lead Management** → Auto-capture inquiries from website forms and social channels into Salesforce; qualify leads with scoring.

- **Property Visit Scheduling** → Allow agents to book visits, send SMS/email reminders, and track attendance.

- **Deal Closure** → Manage offers, negotiations, booking amounts, and closing documentation digitally.

- **Reporting & Dashboards** → Track monthly sales, agent activity, lead funnel stages, and property performance.