TourFlow: Real Estate Workflow Automation

Problem Statement:

A real estate brokerage needs to replace its inefficient, manual processes with a secure and scalable solution to manage the full client and tour lifecycle. The current reliance on disorganized spreadsheets, paper notes, and manual email follow-ups leads to poor client experiences and lost opportunities. The system must centralize client data, automate key communications, provide a clear process for handling client interest and offers, and offer a modern, mobile-friendly interface for agents to increase efficiency and drive sales.

Phase 1: Problem Understanding & Industry Analysis

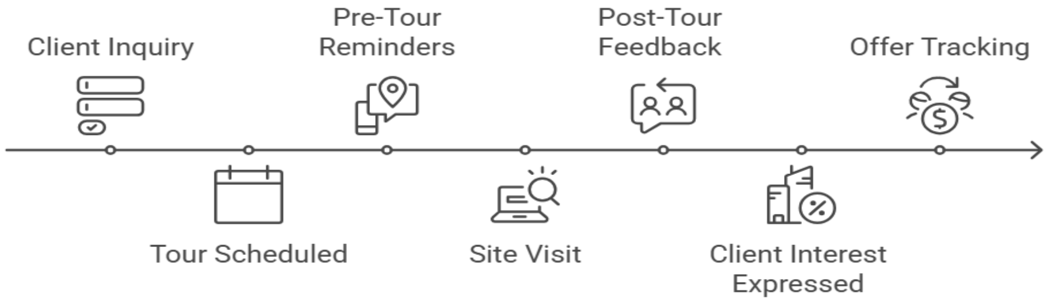
Requirements Gathering:

- Tracking every step of a property tour, from the initial client inquiry to a completed visit and subsequent follow-up.
- It should automatically send timely reminder emails to clients and follow-up emails to collect feedback.
- It needs a clear, digital process for handling client interest, including a workflow to notify agents and change property status when an offer is made.
- It should store all client information, tour history, and property details securely.
- A strict role-based access to ensure users can only see and interact with data relevant to their role.
- It should display property photos for an enhanced user experience.
- It should be able to provide managers with dashboards of tour activity, client interest, and feedback trends.

Stakeholder Analysis

- **Real Estate Agents:** They are the primary users who need an easy way to manage clients and tours. They require a central hub for all client information, automated reminders, and a simple way to get feedback.
- **Clients:** They are the end-users of the app's external features. They need professional and timely communication, along with a simple process for providing feedback and viewing property photos.

- **Managers/Brokers:** They are responsible for oversight and strategy. They need a clear view of team performance through dashboards, as well as a centralized view of all



upcoming tours and client interest.
- **Administrators:** They are the builders and maintainers of the system. They require a scalable platform, easy-to-configure automation tools, and robust security controls**.**

Business Process Mapping

- Automated reminders sent at specific times before and after a tour.
- Email triggers for reminders and feedback requests.
- The process for a client to express interest is captured directly in the system, triggering a new workflow.
- The system can be configured to require manager approval for a formal offer, ensuring a clear sales process.
- Automated email notifications to agents when a client expresses high interest.

Industry-specific Use Case Analysis

- **Client Relationship Management:** Centralize all client interactions, tour history, and feedback for a personalized sales approach.
- **Tour Scheduling Automation:** Automate the manual task of sending reminders to reduce no-shows and improve client engagement.
- **Offer Tracking:** Provide a clear, digital workflow for managing client offers, updating property status, and notifying relevant stakeholders.

- **Media Management:** Securely store and display property photos and documents directly on the record pages.
- **Mobile-First Design:** All features and interfaces must be fully functional and user-friendly on a mobile device, as agents are frequently in the field.
- **Reporting:** Maintain a complete history of all tour records and client interactions for business insights and dispute resolution.

AppExchange Exploration

- **Calendar & Scheduling Apps:** Prebuilt components to enhance the tour scheduling LWC.
- **Document Management Apps:** For secure document storage and e-signature capabilities.
- **Analytics & Dashboard Apps:** To provide more advanced visualization and reporting tools for managers.