Phase 1: Problem Understanding & Industry Analysis

Project Title:

Smart Property Portal – Real Estate Customer Engagement & Lead Conversion System

Problem Statement:

The real estate company receives thousands of real estate inquiries through its website, offline listings, and social media platforms. However, the current process of managing leads, scheduling property visits, and tracking customer interactions is manual, fragmented, and inefficient. Sellers often struggle to prioritize high-value buyers, property managers experience delays in updating inventory, and prospective buyers experience slow returns and poor communication.
This results in wasted time, longer sales cycles, and reduced customer satisfaction.
To address these challenges, the company hopes to use a Salesforce-based Smart Property Portal that:

- Automate lead capture and qualification
- Centralize property management and appointment scheduling
- Track customer satisfaction, offers, and conversations
- Enable real-time dashboards and reports for sales and pipeline tracking

Industry Analysis:

The real estate industry is highly competitive and customer-driven, with a heavy reliance on timely and accurate communication with prospective buyers. Challenges include managing a large volume of property inquiries, inefficient manual tracking of property visits, and difficulties in prioritizing leads based on their purchase intent. Digital transformation is key to enhancing customer experience, improving agent productivity, and driving faster deal closures.

Requirement Gathering:

- Automate lead capture from web forms and social media.
- Enable assignment of leads to agents by territory.
- Automate lead qualification using an interest score.
- Manage a catalogue of properties with details like location, price, features.
- Schedule and track property visits.
- Automate SMS and email confirmations.

Manage deal closures: track offers, negotiations, closure status, and document uploads.
Provide dashboards to track monthly sales performance, lead funnel, and agent activity.

Stakeholder Analysis:

Sales Agents: Need to manage leads, property visits, and track follow-ups efficiently.
Property Managers: Maintain property inventory and update availability in real time.
Prospective Buyers: Want seamless inquiry submission and scheduling of property visits.
Sales Managers: Require real-time dashboards to monitor team performance and sales pipeline.
IT/Admin Team: Responsible for setting up and maintaining the Salesforce environment.

Business Process Mapping:

Lead Entry → Automated Capture → Lead Assignment → Lead Qualification → Follow-up Scheduling → Visit Confirmation → Deal Negotiation → Deal Closure → Reporting & Analysis.

Property Inventory → Property Update (by managers) → Property Search (by agents) → Visit Scheduling → Customer Visit → Offer & Negotiation → Booking & Documentation → Deal Closure.

Industry-Specific Use Case Analysis:

Lead Management Use Case: Automating the capture of leads from web forms and social media eliminates manual entry errors and speeds up initial response time.
Property Management Use Case: Centralized inventory helps agents and managers quickly check property availability and details.
Visit Scheduling Use Case: Integration of visit scheduling with automated SMS/email notifications improves communication with prospective buyers and reduces no-shows.
Deal Closure Use Case: Capturing deal details systematically helps maintain accurate records and improves deal closure efficiency.
Reporting Use Case: Dashboards provide management with actionable insights into sales performance, funnel conversion rates, and agent activity.

AppExchange Exploration:

Explore Salesforce AppExchange for complementary apps that can support SMS notifications, enhanced reporting, document management, or lead scoring enhancements.