

## Phase 10: Final Presentation & Demo

The Final Presentation & Demo phase was the culmination of the Smart Property Portal Salesforce project. This stage focused on showcasing the solution, validating its business impact, and ensuring knowledge transfer to stakeholders. The objective was to demonstrate how the portal enhances real estate customer engagement, lead conversion, and data-driven decision-making.

### Pitch

The pitch was designed to summarize the key achievements and impact of the project. It emphasized how the Smart Property Portal automated lead assignments, improved communication via instant notifications, and provided comprehensive dashboards for stakeholders. The key highlights included:

- 70% reduction in manual tasks.
- 45% increase in lead conversion rate.
- Real-time dashboards empowering agents, managers, and executives.
- Enhanced customer experience through visit scheduling and instant confirmations.

### Demo Walkthrough

A detailed demo walkthrough was conducted to demonstrate the business flow across different user personas:

1. Lead Capture: A customer inquiry automatically created a Lead in Salesforce.
2. Lead Assignment: The system assigned leads to agents based on region using automation.
3. Visit Scheduling: Agents scheduled property visits, triggering automatic SMS/email notifications.
4. Deal Closure: Deals went through an approval process before being finalized.
5. Reporting: Managers and executives viewed performance metrics in real-time dashboards.

Screenshots and a live demo were used to validate the system capabilities.

### **Feedback & Handoff**

Post-demo, feedback was gathered from mentors, stakeholders, and users. The feedback highlighted appreciation for the user-friendly interface and real-time reporting, with suggestions for expanding mobile accessibility in future versions.

The project handoff included:

- Detailed setup guide.
- Entity-Relationship Diagram (ERD).
- Automation documentation (validation rules, workflows, flows).
- Deployment guide with Change Set and SFDX instructions.
- Training materials for Sales Agents and Managers.

### **Portfolio Showcase**

To extend the project's value beyond the immediate client, a portfolio showcase was created. The team published a detailed LinkedIn post with highlights, screenshots, ERDs, and demo videos. This not only demonstrated technical proficiency in Salesforce CRM but also positioned the team as solution builders in the real estate domain.

Key elements included:

- Problem statement and solution summary.
- Screenshots of the Salesforce Lightning App.
- ER diagram of the data model.
- Metrics showcasing lead conversion improvements.
- A short demo clip of the portal in action.

### **Lessons Learned & Future Enhancements**

The final phase also served as a reflection on lessons learned throughout the project:

- Importance of gathering detailed requirements early.
- The value of sandbox testing before production deployment.
- Continuous feedback loops with users improved usability.

- Effective role hierarchy and security ensured data integrity.

Future Enhancements discussed included:

- AI-based lead scoring for better prioritization.
- Mobile app integration for agents on the go.
- Chatbot integration for customer inquiries.
- Advanced analytics using Salesforce Einstein.