Phase 1 – Problem Understanding & Industry Analysis

Project: PropertyCare CRM (Smart Real Estate CRM)

1. Requirement Gathering

Feature Needed	Why Needed	Priority
Auto Lead Assignment	Reduce manual delays in assignment	High
Property Inventory	Track availability, price, location	High
Visit Scheduling	Easily schedule property visits	Medium
Deal Tracking	Monitor negotiations & closures	High
Dashboards	Monitor sales & agent performance	High

2. Stakeholder Analysis

Stakeholder	Role	Responsibility	Needs
Sales Agent	Lead Handler	Follow-up, property visits	Quick access to leads, reminders
Property Manager	Inventory Control	Manage property listings	Track property details
Customer	Buyer	Inquiry & visit requests	Quick responses, updates
Management	Decision Making	Track sales & performance	Dashboards, reports

3. Business Process Flow

Below is the high-level workflow for PropertyCare CRM:

Lead Inquiry →	Agent Assignment →	Follow-up →	Property Visit →	Negotiation →	Deal Closure

4. Industry-Specific Use Cases

Industry Challenge	Salesforce Solution
Missed follow-ups	Automated reminders with Flow/Email
Scattered leads in Excel	Centralized Lead object
No insights for managers	Dynamic dashboards
Manual property tracking	Custom Property object

5. AppExchange Exploration

App Name	Purpose	Link
SMS Magic	Send property visit reminders	https://appexchange.salesforce.com
DocuSign	Digital agreement signing	https://appexchange.salesforce.com
Property Base	Real estate CRM extension	https://appexchange.salesforce.com